

# Summary

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### FEATURE ARTICLES

Regional household and family characteristics in Western Australia  
Retail industry in Western Australia



### STATE ACCOUNTS

State final demand in Western Australia (trend chain volume terms) has slowed steadily over the last three quarters, from a growth of 3.2% (\$923 million) in the March quarter 2007, decelerating by 1.2% (\$383 million) or \$31,249 million in the December quarter 2007.



### PRICES

Perth's Consumer Price Index (CPI) rose by 0.8% in the December quarter 2007, slightly up from the 0.6% recorded in the previous quarter but lower than the national growth of 0.9%.



### CONSUMPTION

Retail turnover (trend) in Western Australia rose by 0.7% (\$44 million) to \$6,455 million for the three months to January 2008. Sales of new motor vehicles (trend) in Western Australia rose 0.2% (66) to 30,894 in the three months to February 2008, compared to the previous three months period.



### INVESTMENT AND FINANCE

Private new capital expenditure (trend chain volume measure) in Western Australia increased by 1.5% (\$77 million) to \$5,301 million in the December quarter 2007, lower than the growth of 2.1% (\$109 million) recorded in the previous quarter. The number of dwellings financed for owner occupation (trend) in Western Australia increased 1.2% (305 commitments) in the three months to January 2008, compared to the previous three month period.



### CONSTRUCTION

In the three months to January 2008, there were 4,312 houses approved for construction, 2.0% (89) less in the previous three months. the number of new house approvals (original) in Western Australia fell by 9.1% or 413 approvals, from the previous three month period.



### TRADE

Western Australia's trade surplus declined by 4.5% (\$457 million) to \$9,604 million through the year to December quarter 2007. The value of Western Australia's exports rose by 1.1% (\$173 million) to \$15,283 million through the year to December quarter 2007. The value of Western Australia's imports rose by 11.3% (\$630 million) to \$6,218 million through the year to December quarter 2007.



### MINING

Expenditure on mineral exploration (trend) in Western Australia rose 8.7% (\$24 million) to \$295 million in the December quarter 2007.



## TOURISM

Western Australia recorded 7,766 (8.8%) less overseas holiday-makers to the state than the corresponding quarter of 2006. There were 21,763 (25.1%) more Western Australians holidaying overseas in the December quarter 2007, compared to the same period of 2006.



## LABOUR MARKET

There were 32,600 job vacancies in Western Australia in the November quarter 2007, an increase of 9.8% (or 2,900) compared to the previous period. Full-time employment (trend) in Western Australia rose by 1.1% (9,000) to 815,600 persons in the three months to February 2008. The number of unemployed persons (trend) in Western Australia fell by 5.8% (2,200) to 35,900 persons in the three months to February 2008.



## POPULATION

The estimated resident population of Western Australia was 2,118,532 in the September quarter 2007, an increase of 12,749 persons (0.6%) from the previous quarter. The state's quarterly population growth was second to the Northern Territory (0.7%) and above the national increase of 0.4%.



## SOCIAL TRENDS - FAMILIES AND HOUSEHOLDS

In 2006, 11,600 marriages were registered in Western Australia, an increase of 500 (4.3%) from 2005. There were 27,800 births registered in Western Australia in 2006. This was 5.8% higher than in 2005 (26,300 births), 9.8% higher than in 2004 (25,300 births) and 12.0% higher than in 1996 (24,800). In June 2007, 11.8% of children aged under 15 years (49,200) in Western Australia were living in families where no parent was employed, decreasing from 16.3% in June 1997.

# State accounts

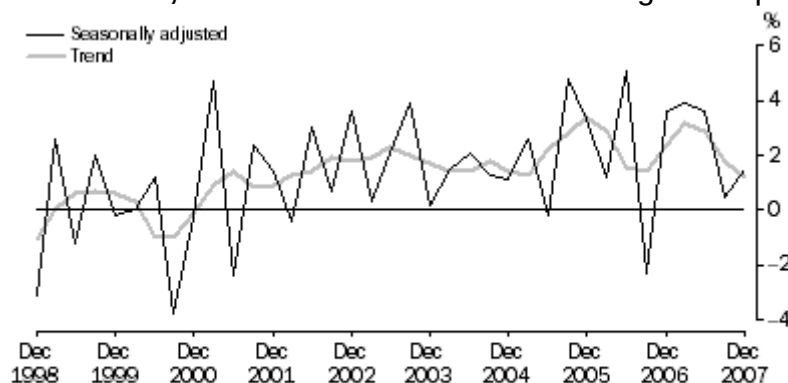


## STATE ACCOUNTS

### STATE FINAL DEMAND

State final demand in Western Australia (trend chain volume terms) has slowed steadily over the last three quarters, from a growth of 3.2% (\$923 million) in the March quarter 2007, decelerating by 1.2% (\$383 million) or \$31,249 million in the December quarter 2007. Western Australia's increase of 1.2% in the current quarter was the third highest increase among the states and territories, behind Tasmania (up 1.6%) and Victoria (up 1.4%). Nationally, domestic final demand grew by 1.1%.

### STATE FINAL DEMAND, Chain volume measures - Change from previous quarter



Source: Australian National Accounts: National Income, Expenditure and Product, cat. no. 5206.0.

In seasonally adjusted chain volume terms, Western Australia's state final demand rose 1.5% (\$459 million) to \$31,206 million in the December quarter 2007, higher than the increase of 0.5% recorded in the previous quarter. The rise was attributable to final consumption expenditure, with household consumption up 2.4% (\$345 million) and general government consumption up 1.8% (\$70 million). Growth was also recorded in the private gross fixed capital formation, with business investment increasing in machinery and equipment (up 4.9% or \$155 million) and dwellings (up 1.5% or \$34 million). Detracting from growth in the December quarter 2007 were falls in non-dwelling construction (down 4.0% or \$180 million), intangible fixed assets (down 4.2% or \$37 million) and ownership transfer costs (down 1.7% or \$10 million).

## Prices



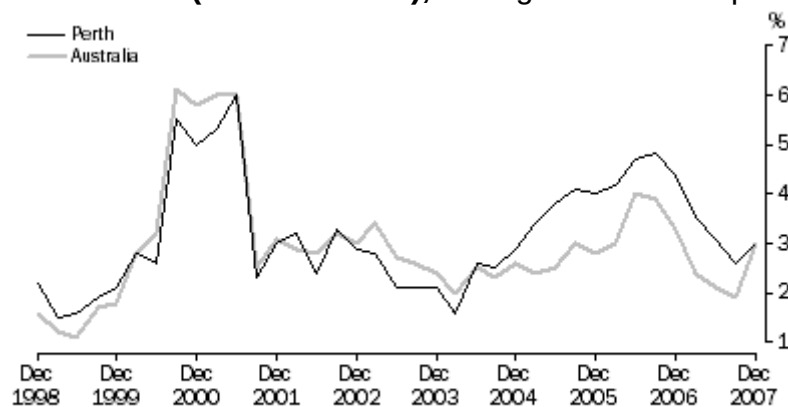
### PRICES

#### CONSUMER PRICE INDEX

Perth's Consumer Price Index (CPI) rose by 0.8% in the December quarter 2007, slightly up from the 0.6% recorded in the previous quarter. Nationally, prices rose 0.9% in the current period. A major contributor to Perth's slowing CPI growth was declining prices in pharmaceuticals, down 4.3% in the December quarter 2007. The fall in the net cost of pharmaceuticals is due to the cyclical effect of the Pharmaceutical Benefit Scheme (PBS) safety net. The number of people accessing the PBS Safety Net benefits peaked in the December quarter. Other significant price falls in Perth included fruit (down 11.8%) and vegetables (down 2.8%).

The main driver of Perth's CPI growth in December quarter 2007 was automotive fuel (up 4.8%). Other major contributors were rents (up 3.2%), domestic holiday travel and accommodation (up 5.1%) and overseas holiday travel and accommodation (up 3.5%). Prices also rose for deposit and loan facilities (up 2.6%).

#### CONSUMER PRICE INDEX (ALL GROUPS), Change from same quarter previous year



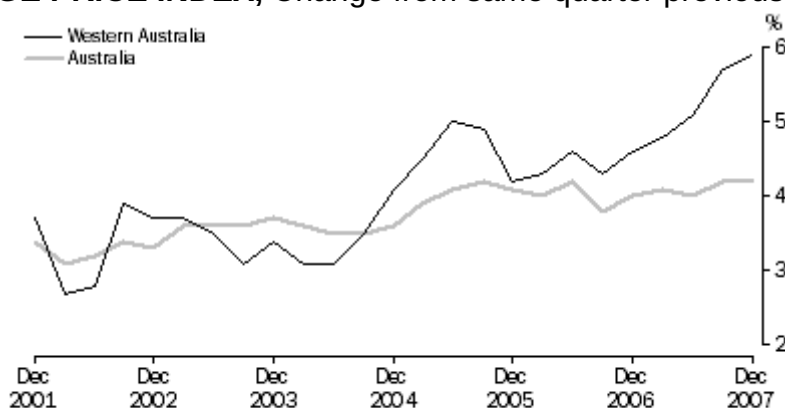
Source: Consumer Price Index, Australia, cat. no. 6401.0.

Through the year to December quarter 2007, Perth's CPI increased by 3.0%, following a rise of 2.6% in the previous period. Perth's CPI growth equalled the national growth and was the third highest among Australian capital cities, behind Brisbane (3.9%) and Melbourne (3.3%). The main contributors to Perth's CPI growth during the year were rents (up 11.2%), house purchases (up 3.3%) and automotive fuel (up 13.4%). Partially offsetting these rises were declining prices in fruits (down 24.6%), child care (down 26.2%) and audio, visual and computing equipment (down 12.7%). The rate of CPI growth recorded nationally reached the top of the Reserve Bank of Australia's (RBA) medium-term target range for inflation of 3.0%, which influenced a decision by the RBA to increase official interest rates by 25 basis points to 6.5% in August 2007, 6.75% in November 2007 and 7.0% in February 2008.

## WAGE PRICE INDEX

Western Australia's Wage Price Index (WPI) of total hourly rates of pay (excluding bonuses) for all sectors rose 1.3% in the December quarter 2007, following an increase of 1.8% the previous quarter. Private sector wage prices grew 1.3%, marginally higher than public sector wage prices at 1.2%. Western Australia's all sectors WPI growth for the quarter is the highest wage price growth amongst the states and territories and exceeded the Australian WPI growth of 1.0%.

**WAGE PRICE INDEX, Change from same quarter previous year**



Source: Labour Price Index, Australia, cat. no. 6345.0.

Through the year to December quarter 2007, Western Australia all sectors recorded the highest WPI growth (5.9%) since the series began in September quarter 1997. This increase was considerably higher than other states and territories, with South Australia showing the next highest increase of 4.9%. At the Australia level, the WPI increased by 4.2% through the year to December quarter 2007. Australia level all sectors and private sector wage price growth, through the year to December quarter 2007, is higher than public sector growth for the first time in five years.

In Western Australia, wage price growth was strongest in the Construction (7.8%), Manufacturing (7.5%) and Personal and other services (7.1%) industries, while Education (4.4%) and Health and community services (4.4%) industries both showed the least growth. In the occupation categories, wage prices for Tradespersons and related workers (9.0%), Intermediate production and transport workers (7.0%) and Labourers and related workers (6.6%) showed strong growth.

## Consumption



## CONSUMPTION

### RETAIL TRADE

Retail turnover (trend) in Western Australia rose by 0.7% (\$44 million) to \$6,455 million for the three months to January 2008, compared to the previous three month period. The increase was lower than the 1.2% (\$73 million) rise recorded in the three months to October 2007. Nationally, retail turnover was higher at 1.5% in the three months to January 2008, following an increase of 2.1% in the previous three month period.

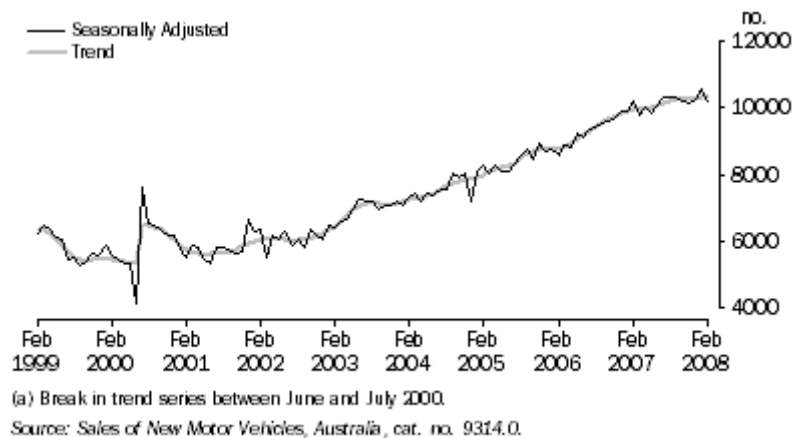


The main industry group driving Western Australia's growth in retail turnover (trend) in the three months to January 2008 was other retailing, up \$19 million (3.1%). Other retailing includes pharmaceuticals, cosmetics, toiletries, antiques and used goods, garden supplies, flowers, watches and jewellery. Food retailing (up \$15 million or 0.6%), recreational good retailing (up \$8 million or 3.1%) and hospitality and services (up \$8 million or 1.0%) also attributed to the state's retail turnover growth. In contrast, household good retailing (down \$17 million or 1.5%) experienced a downfall in growth over the same period.

### NEW MOTOR VEHICLE SALES

Sales of new motor vehicles (trend) in Western Australia rose 0.2% (66) to 30,894 in the three months to February 2008, compared to the previous three months period. Growth in new motor vehicle sales was driven by other vehicles (includes utilities, vans, trucks and buses), up 3.6% (263) and sports utility vehicles (up 2.0% or 131). Passenger vehicle sales fell 1.9% (328) to 16,688 in the three months to February 2008.

### NEW MOTOR VEHICLE SALES



## Investment and finance

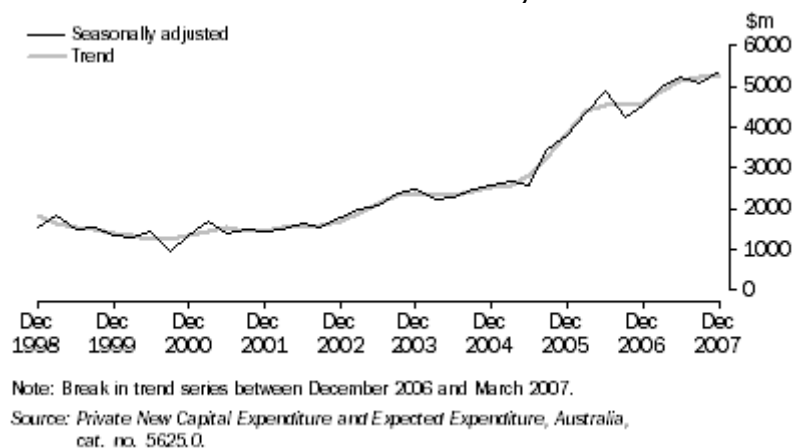


### INVESTMENT AND FINANCE

#### PRIVATE NEW CAPITAL EXPENDITURE

Private new capital expenditure (trend chain volume measure) in Western Australia increased by 1.5% (\$77 million) to \$5,301 million in the December quarter 2007, lower than the growth of 2.1% (\$109 million) recorded in the previous quarter. The rise in the December quarter 2007, was driven by investment in both buildings and structures (up \$50 million or 1.5%) and equipment, plant and machinery (up \$23 million or 1.2%). Western Australia's growth in private new capital expenditure over this period was considerably higher than the national growth of 0.3%.

#### PRIVATE NEW CAPITAL EXPENDITURE, Chain volume measures

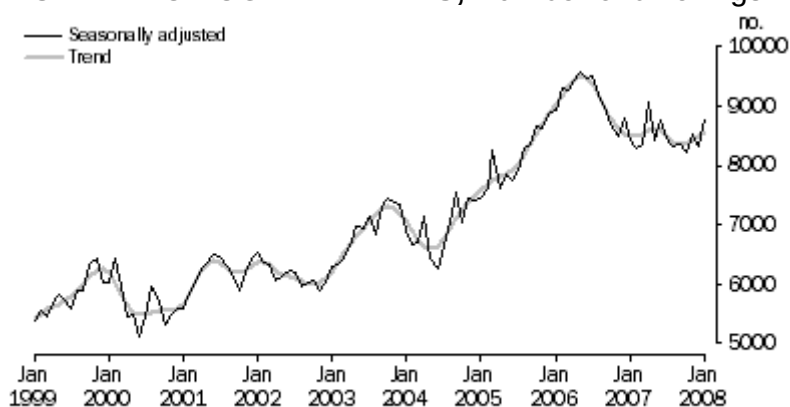


In original current price terms, Western Australia's business investment rose 20.4% (\$1,038 million) to \$6,114 million through the year to December quarter 2007. This rise was mainly driven by increased investment in the mining industry, up \$730 million (20.5%). Other selected industries (including retail trade, property and business services and construction) (up \$169 million or 14.9%) and manufacturing (up \$139 million or 37.6%) also recorded growth over the same period.

## HOUSING FINANCE COMMITMENTS

The number of dwellings financed for owner occupation (trend) in Western Australia increased 1.2% (305 commitments) in the three months to January 2008, compared to the previous three month period. Since September 2007 (8,357), the number of dwellings financed has risen for four successive months to 8,554 in January 2008. However, in original terms, there were 24,239 dwellings financed in Western Australia in the three months to January 2008, 3.5% (875) less than in the previous three months. Dwellings financed by non-first home buyers fell 3.7% (764), while dwellings financed by first home buyers also declined 2.5% (111).

### HOUSING FINANCE COMMITMENTS, Number of dwellings financed



The total value of housing finance for owner occupation (original) in Western Australia decreased 6.5% (\$392 million) in the three months to January 2008, compared to the previous three month period. The average loan size for first home buyers fell 3.8% (\$9,300) and for non-first home buyers it fell 3.0% (\$7,100). The difference between the average loan size for first home buyers and non-first home buyers has narrowed considerably in Western Australia in recent months. In July 2007, the average loan size for first home buyers (\$259,500) was \$23,700 higher than the non-first home buyers (\$235,800), but in January 2008 the average loan size for first home buyers (\$231,100) was \$1,700 less than the non-first home buyers (\$232,800).

## Construction



### CONSTRUCTION

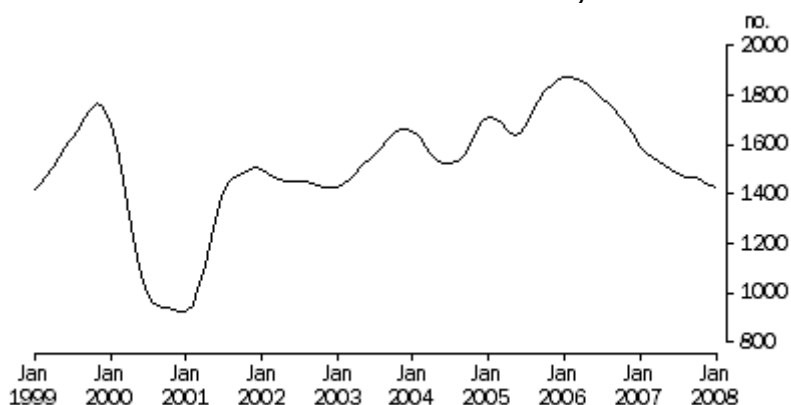
#### BUILDING APPROVALS

The number of building approvals (trend) in Western Australia has fallen for twenty three consecutive months, from 1,875 approvals in February 2006 to 1,424 approvals in January 2008 - down 24.1% or 451 approvals. In the three months to January 2008, there were 4,312 houses approved for construction, 2.0% (89) less in the previous three months. The rate of decline remained the same as the rate recorded for the three months to October



2007 (down 2.0% or 91). In contrast, other residential dwelling approvals grew 7.2% (103) to 1,524 approvals in the three months to January 2008 - other dwellings comprise semi-detached houses, townhouses and flats, units and apartments.

#### NUMBER OF DWELLINGS APPROVED, Houses: Trend



Source: Building Approvals, Australia, cat. no. 8731.0.

In the three months to January 2008, the number of new house approvals (original) in Western Australia fell by 9.1% or 413 approvals, from the previous three month period. This decline coincided with a 1.3% (\$14 million) fall in the total value of new house approvals, down to \$1,123 million. The total number of building approvals also declined from 5,918 approvals in the three months to October 2007 to 5,612 approvals in the three months to January 2008 (down 5.2% or 306 approvals). In contrast, the value of total building approvals increased by 38.0% (\$938 million) to \$3,411 million and the value of new residential buildings also rose, by 13.2% (\$194 million) to \$1,666 million in the three month period to January 2008 (compared to the previous period).

## Trade



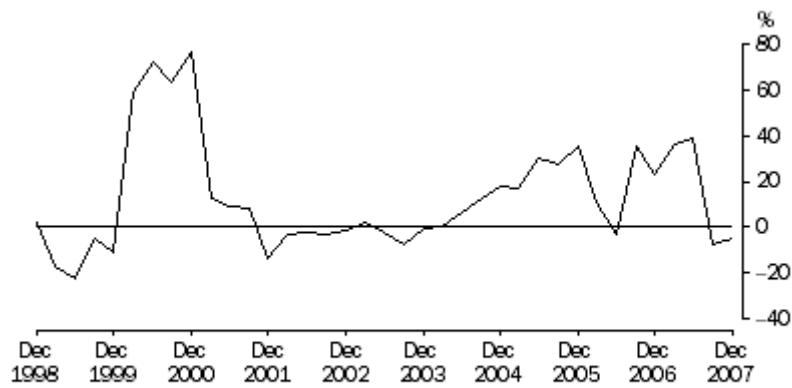
### TRADE

#### BALANCE OF TRADE

The value of Western Australia's trade surplus declined by 4.5% (\$457 million) to \$9,604 million through the year to December quarter 2007, following a decrease in the previous period of 7.7% (\$766 million) through the year to September quarter 2007. The decline was the result of imports growth (11.3% or \$630 million) exceeding exports growth (1.1% or \$173 million).

#### VALUE OF WESTERN AUSTRALIA'S TRADE SURPLUS, Change from same quarter previous year





Source: ABS data available on request, *International Trade in Goods and Services, Australia*, cat. no. 5368.0.

The declining growth in Western Australia's trade surplus between the December quarter 2006 and 2007, was mainly the result of the state's trade balance falling with Japan (down \$496 million), closely followed by India (down \$493 million) and Finland (down \$426 million). There were significant gains, however, in the state's trade surpluses with United Kingdom (up \$1,353 million), Republic of Korea (up \$245 million ) and United States of America (up \$195 million).

## EXPORTS

The value of Western Australia's exports rose by 1.1% (\$173 million) to \$15,283 million through the year to December quarter 2007. The major commodities contributing to the increase were crude petroleum oils (up \$526 million or 30.0%), non-monetary gold (up \$413 million or 17.1%), iron ore and concentrates (up \$164 million or 4.1%), ores and concentrates (up \$103 million or 51.7%) and natural gas (up \$64 million or 5.8%). Commodities detracting from exports growth were mainly combined confidential items (down \$443 million or 16.3%), nickel ores and concentrates (down \$325 million or 64.4%), nickel (down \$123 million or 34.5%) and wheat (down \$99 million or 24.2%).

## IMPORTS

The value of Western Australia's imports rose by 11.3% (\$630 million) to \$6,218 million through the year to December quarter 2007. Strong imports growth was primarily driven by crude petroleum oils (up \$202 million or 47.2%), non-monetary gold (up \$153 million or 12.5%), refined petroleum oils (up \$106 million or 29.6%), fertilizers (up \$90 million or 2446.2%) and civil engineering plant and equipment (up \$71 million or 33.6%).

## Mining

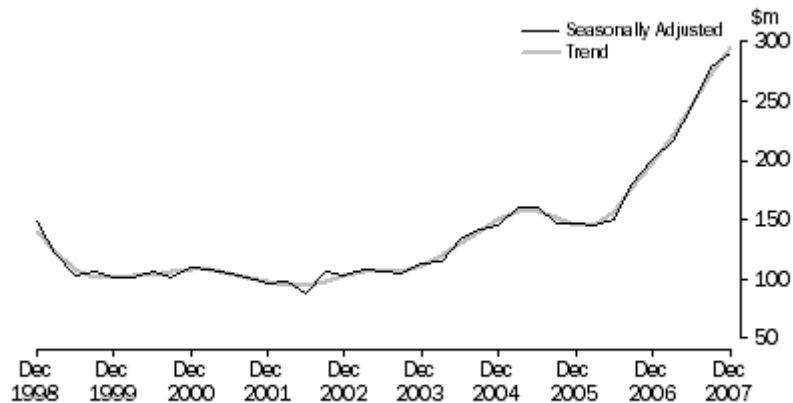


**MINING**

## MINERAL AND PETROLEUM EXPLORATION EXPENDITURE

Expenditure on mineral exploration (trend) in Western Australia rose 8.7% (\$24 million) to \$295 million in the December quarter 2007. This rise was slightly lower than the previous period growth of 10.6% (\$26 million) in the September quarter 2007. Despite the state's lower growth in the current quarter, it was the eighth consecutive quarterly rise since December quarter 2005 (\$145 million) and was higher than the national growth (7.4%).

### MINERAL EXPLORATION EXPENDITURE, Total minerals



Source: Mineral and Petroleum Exploration, Australia, cat. no. 8412.0.

In original terms, Western Australia's mineral exploration expenditure grew 44.4% (\$97 million) through the year to December quarter 2007. All of the major minerals showed growth over this period, with nickel and cobalt (up \$42 million or 114.3%) having the largest increase. Iron ore (up \$23 million or 32.4%), silver, lead and zinc (up \$11 million or 123.9%), gold (up \$8 million or 10.3%) and copper (up \$4 million or 87.5%) recorded growth through the year to December quarter 2007.

## MINERAL AND PETROLEUM PRODUCTION

Between the December quarters 2006 and 2007, production of most mineral types fell in Western Australia, including diamonds (down 24.4%), ilmenite (down 12.5%), nickel (down 11.8%) and gold (down 9.3%). However, there were increased production in iron ore (up 10.7%), zinc (up 6.3%) and bauxite (up 1.2%). In terms of energy production, natural gas recorded a rise of 0.3%, while electricity (down 0.1%) and crude oil (down 9.5%) decreased through the year.

## Tourism



### TOURISM

#### SHORT-TERM OVERSEAS HOLIDAY ARRIVALS

Western Australia recorded a decline in the number of holiday-makers arriving from

overseas in the December quarter 2007. During this period there were 7,766 (8.8%) less overseas visitors to Western Australia than the corresponding quarter of 2006. Much of the decline can be attributed to less holidaymakers from United Kingdom and Ireland (down 6,919 or 23.9%), Japan (down 1,650 or 21.0%) and Malaysia (down 1,002 or 15.5%). However, there were significantly more holiday travellers from Thailand (up 793 or 70.7%), South Africa (up 419 or 22.1%) and New Zealand (up 217 or 5.8%).

## **SHORT-TERM OVERSEAS HOLIDAY DEPARTURES**

There were 21,763 (25.1%) more Western Australians holidaying overseas in the December quarter 2007, compared to the same period of 2006. Overseas destinations that recorded the largest influx of Western Australian holiday travellers were Indonesia (up 9,779 or 60.6%), Singapore (up 3,883 or 50.1%) and Thailand (up 2,559 or 19.0%). There were, however, less Western Australians holidaying in New Zealand (down 988 or 11.1%) and Malaysia (down 525 or 7.2%) over the same period.

## **Labour market**



### **LABOUR MARKET**

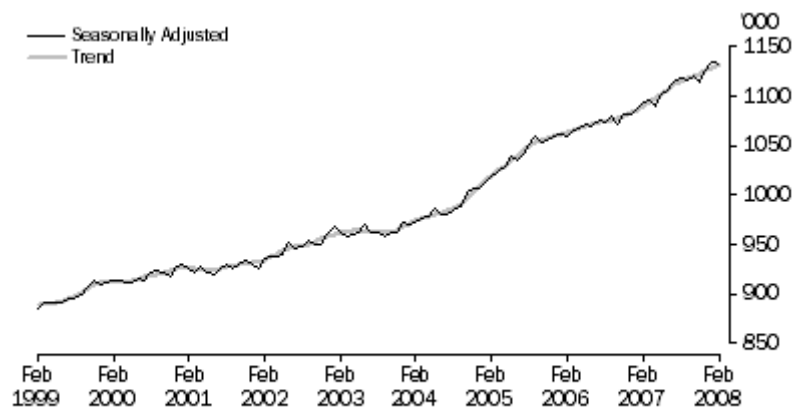
#### **JOB VACANCIES**

Job vacancies in Western Australia have risen for eight consecutive quarters since November quarter 2005. There were 32,600 job vacancies in Western Australia in the November quarter 2007, an increase of 9.8% (or 2,900) compared to the previous period. Through the year to November quarter 2007, job vacancies in the state increased by 36.3% (8,700) to 32,600. The vast majority of vacancies were created in the private sector (up 7,700 or 34.0%), with public sector vacancies also rising over the same period (up 1,000 or 73.4%).

#### **EMPLOYMENT**

Full-time employment (trend) in Western Australia rose by 1.1% (9,000) to 815,600 persons in the three months to February 2008, following an increase of 1.0% (7,900) in the previous three month period. All of the increase in the last three months was attributable to both male and female full-time employment. Female full-time employment rose by 1.6% (4,300), while male full-time employment increased by 0.9% (4,700). Estimated part-time employment in Western Australia rose 0.2% (600) to 316,300 persons in the three months to February 2008, mainly attributable to increased male part-time employment (up 2.1% or 1,800). Female part-time employment, however, was down by 0.6% (1,300). Overall, employment rose 0.9% (9,600) to 1,131,900 persons in the three months to February 2008.

#### **EMPLOYED PERSONS, Total**



Source: Labour Force Australia, Spreadsheets, cat. no. 6202.0.55.001.

The main industries contributing to Western Australia's employment growth (original) of 3.6% (up 39,600) through the year to February 2008 were construction (up 12.5% or 13,800), education (up 17.7% or 12,600) and transport and storage (up 24.3% or 9,800). The number of employed persons declined in accommodation, cafe and restaurants (down 17.7% or 8,600), government administration and defence (down 11.3% or 6,100) and retail trade (down 2.2% or 3,400). The major occupations driving the state's employment growth over the same period were professionals (up 12.6% or 25,000), tradespersons and related workers (up 7.7% or 11,800), and associate professionals (up 7.6% or 10,100).

## UNEMPLOYMENT

The number of unemployed persons (trend) in Western Australia fell by 5.8% (2,200) to 35,900 persons in the three months to February 2008. The fall was attributable to decreases in both male and female unemployment, with male unemployment falling by 6.9% (down 1,400) to 18,800 and female unemployment falling by 3.9% (down 700) to 17,200. The unemployment rate (trend) in Western Australia fell from 3.3% in November 2007 to 3.1% in February 2008. Nationally, the unemployment rate also declined, from 4.3% to 4.1% between November 2007 and February 2008.

### UNEMPLOYMENT RATE



(a) Break in trend series at April 2001.

Source: Labour Force Australia, Spreadsheets, cat. no. 6202.0.55.001.

## Population



## POPULATION

### ESTIMATED RESIDENT POPULATION

The estimated resident population of Western Australia was 2,118,532 in the September quarter 2007, an increase of 12,749 persons (0.6%) from the previous quarter. The state's quarterly population growth was second to the Northern Territory (0.7%) and above the national increase of 0.4%. In the September quarter 2007, Western Australia recorded a natural increase of 4,391 persons (7,773 births less 3,382 deaths), while net overseas migration (up 7,667 persons) and net interstate migration (up 691 persons) also added to the state's population.

## Social trends



## SOCIAL TRENDS

### FAMILIES AND HOUSEHOLDS

#### *Marriages and divorces*

In 2006, 11,600 marriages were registered in Western Australia, an increase of 500 (4.3%) from 2005. All states and territories recorded an increase in registered marriages. Western Australia ranked third behind New South Wales (6.0%) and Victoria (5.1%). The crude marriage rate (the number of marriages per 1,000 of the estimated resident population) for Western Australia also increased from 5.5 in 2005 to 5.6 in 2006. This was lower than the rate in 1996 (5.8).

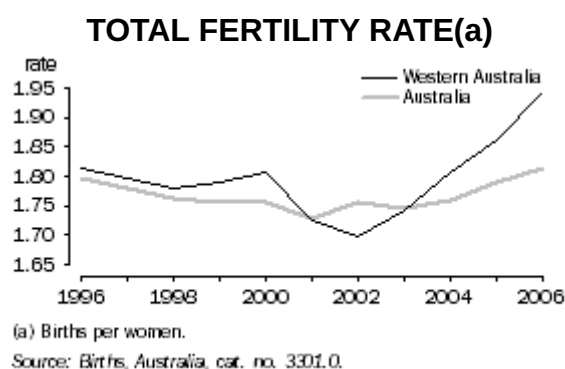
Of all marriages in Western Australia, more than two thirds (67.1%) were first time marriages for both partners (compared to 68.5% nationally). The median age for first time marriage for both males and females decreased slightly in Western Australia. In 2006, the median age was 29.9 years for men and 27.7 years for women, compared to 30.3 and 28.3 years respectively in 2005. In 1996, the respective median ages for first time marriage were 27.8 and 25.8 years.

In Western Australia, there were 5,500 divorces in 2006. The crude divorce rate (the number of divorces per 1,000 of the estimated resident population) declined from 2.8 in 1996 to 2.7 in 2006. The median duration between marriage and divorce has increased from 8.4 years in 1996 to 9.6 years in 2006.

#### *Fertility*

There were 27,800 births registered in Western Australia in 2006. This was 5.8% higher than in 2005 (26,300 births), 9.8% higher than in 2004 (25,300 births) and 12.0% higher than in 1996 (24,800). The total fertility rate (TFR) represents the number of babies that a

woman could expect to bear during her reproductive lifetime based on current age-specific fertility trends. The TFR in Western Australia had generally decreased over a long period falling to a low of 1.70 in 2002. However, it has since increased, reaching 1.86 in 2005 and 1.94 in 2006. Apart from a short period between 2001 and 2003 the TFR for Western Australia has been higher than for Australia over the past decade. Australia's TFR was 1.81 in 2006.



A recent trend has been the increase in births to mothers aged more than 35 years. In Western Australia, the proportion increased from 13.6% in 1996 to 20.8% in 2006. There have been small fluctuations in the proportion of births to mothers aged under 20 years over the same period (5.7% in 1996 and 5.0% in 2006).

### ***Families and work***

In June 2007, 11.8% of children aged under 15 years (49,200) in Western Australia were living in families where no parent was employed, decreasing from 16.3% in June 1997. Over the same period the proportion of couple families with neither parent employed fell from 6.1% to 3.5%. In June 2007, more than half (56.4%) of couple families with children aged under 15 years had both parents employed, which has steadily increased from 53.1% in 1997. The proportion of lone parent families, where the parent was employed, increased from 43.3% to 60.3% over the same period.

## **List of Historical Feature Articles**



### **FEATURE ARTICLES**

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Dec 2007	Regional housing in Western Australia Short-term overseas travel to and from Western Australia
Sep 2007	Regional wage and salary earners in Western Australia - 2001-02 to 2003-04 Cultural diversity in Western Australia
Jun 2007	Research and experimental development in Western Australia General Social Survey - Western Australian summary Changing water and energy use in Perth homes

Mar 2007	The resources industry in Western Australia: 2001-02 to 2005-06
	The agriculture industry in Western Australia
Dec 2006	Pathways in education and related outcomes in Western Australia
	Drivers of Perth's rising prices
	International trade in Western Australia: 2003-04 to 2005-06
Sep 2006	Measures of Western Australia's progress
	Western Australians on the move - A housing perspective
Jun 2006	Labour force trends in Western Australia
	Selected statistics for Aboriginal and Torres Strait Islander people in Western Australia
Mar 2006	Skills shortages in Western Australia - Part 2
	Household expenditure in Western Australia
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Jun 2005	Western Australia's changing trade relations - The emergence of China and India
	Disability, ageing and carers in Western Australia
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	Social interactions and support in Western Australia
Dec 2004	The impact of rising house prices on the WA economy
	State accounts: A snapshot of WA's economy in 2003-04
Sep 2004	Intra-state migration
Jun 2004	Household water conservation and use in Western Australia
Mar 2004	Regional wage and salary earners in Western Australia
	The impact of migration on Western Australia's population
Dec 2003	The construction industry in Western Australia
Sep 2003	The winemaking industry in Western Australia
Jun 2003	Population measures: A case study
	Salinity and land management on Western Australia farms
Mar 2003	Demystifying chain volume measures
Dec 2002	Western Australia: A small area perspective
Sep 2002	Western Australia's age and sex distribution
Jun 2002	The resources industry in Western Australia
	Understanding population measures
Mar 2002	Interpreting time series data
Dec 2001	A view of housing density in Perth
	Educational participation in Western Australia
Sep 2001	A century of population change in Western Australia
	Foreign capital expenditure in Western Australia
Jun 2001	Use of information technology in Western Australia
	Methods of setting pay in Western Australia
Mar 2001	Crime and safety in Western Australia
Dec 2000	Small business in Western Australia
Sep 2000	Western Australia's' merchandise trade with the rest of the world

## Notes

### NOTES

### FORTHCOMING ISSUES

#### ISSUE (QUARTER)

June 2008

#### Release Date

16 July 2008

### CHANGES IN THIS ISSUE

No changes in this issue.



## INTERNET

This publication and all published feature articles can be downloaded free from the Australian Bureau of Statistics web site at <<https://www.abs.gov.au>>. Go to Themes-Regional-Western Australia-WA releases-1367.5 Western Australian Statistical Indicators.

## EXPLANATORY NOTES

The statistics shown are the latest available as at 20 March 2008. Explanatory Notes of the form found in other ABS publications are not included in **Western Australian Statistical Indicators**. Readers are directed to the Explanatory Notes contained in related ABS publications.

## INQUIRIES

For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070 or Amy Gardos on Perth (08) 9360 5111.

## About this Release

Contains the most recent statistics for Western Australia covering: state accounts; prices; consumption; investment and finance; construction; trade; mining and energy; agriculture; tourism; labour market; population; crime; and social trends. Quarterly issues include an analysis of recent movements in key state data, as well as feature articles reviewing aspects of Western Australia's economy and/or society.

## Regional household and family characteristics in Western Australia (Feature Article)

### FEATURE ARTICLE 1: REGIONAL HOUSEHOLD AND FAMILY CHARACTERISTICS IN WESTERN AUSTRALIA

#### INTRODUCTION

Western Australia's population has increased substantially in recent years, creating challenges for state and local governments in the areas of planning, service delivery and infrastructure needs. The recent changes to patterns of migration and internal mobility, as well as family and household composition, highlight the effects of the recent significant economic growth on Western Australia's home life and local communities.

This article analyses how the latest Western Australian population data from the 2006 Census of Population and Housing has changed from the previous Census collections in 1996 and 2001. This analysis complements the Regional Housing in Western Australia

article (released in this publication for the December 2007 quarter) to provide an holistic analysis of economic and social data for selected regions in Western Australia.

## DIFFERING POPULATION MEASURES

### Census of Population and Housing

The Census of Population and Housing is conducted every 5 years and provides a rich data source for measuring changes in population numbers and characteristics for various geographic areas in Australia. The Census provides two important population counts for areas in Australia:

- Place of enumeration - is a count of the number of people based on where they slept on Census night.
- Place of usual residence - the Census asks people to provide their usual address (i.e. for more than 6 months of the year), if they were not staying at home on Census night.

### Estimated Resident Population

The Estimated Resident Population (ERP) series is the official measure of population change for areas in Australia. The ERP provides a more accurate measure than the Census of population growth and decline as it adjusts for known limitations in Census data. While the Census aims to count everyone in Australia on Census night, some people are missed or counted more than once. The ABS conducts a Post Enumeration Survey (PES) after each Census to estimate the number of people who were missed or counted more than once in the Census. In Census years, the PES results allow Census data to be adjusted to more accurately reflect actual resident populations for areas in Australia. Other adjustments applied to Census counts to obtain ERP in Census years include removing the count of overseas visitors, adding Australian residents temporarily overseas and timing adjustments which take into account that the Census is conducted in August while ERP is calculated for 30 June. For a more detailed explanation about ERP see **Demography, Australia** (cat. no. 3101.0). The table below illustrates how the 2006 Census data was adjusted to obtain 30 June 2006 ERP.

### ADJUSTMENT COMPONENTS OF ESTIMATED RESIDENT POPULATION, preliminary - 30 June 2006

Components as at 8 August 2006:	WA ( <sup>000</sup> )
Census count, place of enumeration	1 986.2
plus - residents absent interstate	19.2
less - interstate visitors	25.1
less - overseas visitors	21.3
<i>equals - Census count, place of usual residence</i>	<i>1 959.1</i>
plus - allowance for under-enumeration(a)	64.1
plus - demographic adjustment(a)(b)	-1.4
plus - residents temporarily overseas(a)	41.7
<i>equals - ERP as at 8 August 2006(a)</i>	<i>2 063.6</i>
less - births(a)(c)	3.0
plus - deaths(a)(c)	1.3
less - net interstate migration(a)(c)	0.4
less - net overseas migration(a)(c)	2.5
<b>equals - preliminary ERP 30 June 2006</b>	<b>2 059.0</b>

(a) These estimates are preliminary and may change in compilation of final rebased estimates.

(b) Demographic adjustments are designed to resolve any statistical anomalies in the age sex composition of the derived population estimates.

(c) Component data calculated for the period 1 July to 8 August 2006.

Australian Demographic Statistics, March 2007, cat. no. 3101.0)

For the purposes of the regional analysis in this article, the Census usual residence counts will be used, because additional information about household or family composition is sourced from Census data, rather than ERP. However, as ERP is the official population measure, the table below has been included for the selected regions to show the official population changes for the last ten years.

### ESTIMATED RESIDENT POPULATION(a), selected local government areas, 1996 to 2006

	ERP at 30 June		2006 no.	Change 1996-2001		Change 2001-2006	
	1996 no.	2001 no.		no.	%	no.	%
Albany (C)	28 148	31 236	33 144	3 088	11.0	1 908	6.1
Beverley (S)	1 453	1 573	1 638	120	8.3	65	4.1
Chittering (S)	2 409	2 936	3 683	527	21.9	747	25.4
Northam (T)	6 471	6 573	6 412	102	1.6	-161	-2.4
Northam (S)	3 239	3 670	3 959	431	13.3	289	7.9
Toodyay (S)	3 363	4 068	4 309	705	21.0	241	5.9
York (S)	2 904	3 233	3 260	329	11.3	27	0.8
Avon Arc	19 839	22 053	23 261	2 214	11.2	1 208	5.5
Broome (S)	9 766	13 196	14 436	3 430	35.1	1 240	9.4
Bunbury (C)	27 641	30 493	31 421	2 852	10.3	928	3.0
Busselton (S)	18 158	23 099	26 638	4 941	27.2	3 539	15.3
Dalwallinu (S)	1 767	1 882	1 443	115	6.5	-439	-23.3
Geraldton (C)	20 200	20 130	20 233	-70	-0.3	103	0.5
Kalgoorlie/Boulder (C)	29 587	29 651	30 399	64	0.2	748	2.5
Leonora (S)	2 774	1 998	1 529	-776	-28.0	-469	-23.5
Mandurah (C)	40 460	48 877	58 457	8 417	20.8	9 580	19.6
Roebourne (S)	13 829	15 058	17 671	1 229	8.9	2 613	17.4
<b>Western Australia</b>	<b>1 765 256</b>	<b>1 901 159</b>	<b>2 059 045</b>	<b>135 903</b>	<b>7.7</b>	<b>157 886</b>	<b>8.3</b>

(a) The regions selected are for local government areas only. This article includes Census geography which combines local government areas and statistical local areas. As ERP is not generated for the Census regions, the population data is not directly comparable for all geographic regions.

Regional Population Growth, 1996 to 2006, cat. no. 3218.0.

## REGIONAL ANALYSIS

To complement the Regional Housing in Western Australia article published last quarter, the same geographic regions for analysis have been included. These areas were chosen to provide a diverse picture of Western Australia that is often masked by whole of state analysis. Large population numbers in urban areas, such as Perth, often disguise regional trends and patterns.

Below is a description of the geographic areas included in this article which relate to the **2006 Australian Standard Geographic Classification** (cat. no. 1216.0).

- Albany, identified as the City of Albany.

- Avon Arc, is a region east of Perth which comprises the Shires of Beverley, Chittering, Toodyay, York, Northam and the Town of Northam. This region is recognised by state government agencies for planning and development resources as well as associations, such as the Real Estate Institute of WA (REIWA). The Town and Shire of Northam were amalgamated in July 2007.
- Broome, identified as the Shire of Broome.
- Bunbury is the Bunbury Statistical Subdivision which covers the LGAs of the City of Bunbury plus the Statistical Local Areas (SLA) of Capel Part A, Dardanup Part A and Harvey Part A. The Part A SLAs are an urban fringe which surrounds the City of Bunbury.
- Busselton, identified as the Shire of Busselton.
- Dalwallinu, identified as the Shire of Dalwallinu.
- Geraldton, which is covered by the Geraldton Statistical Subdivision. This includes the City of Geraldton and the adjoining urban portion of the Shire of Greenough. These two LGAs were amalgamated in mid-2007.
- Kalgoorlie is the SLA of Kalgoorlie Part A which covers the urban portion of the City of Kalgoorlie/Boulder.
- Leonora, identified as the Shire of Leonora.
- Mandurah is the Mandurah Statistical Subdivision which comprises the LGAs of the City of Mandurah and the Shire of Murray.
- Roebourne, identified as the Shire of Roebourne.

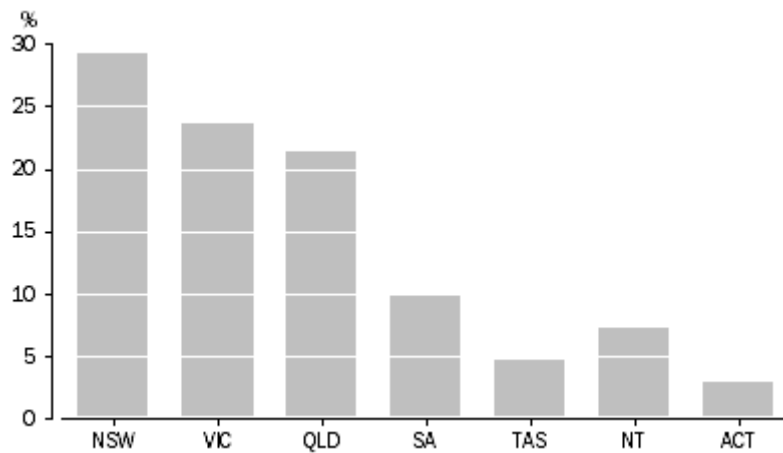
## **WESTERN AUSTRALIA - usual residence**

Western Australia's usual resident population was 1,959,090 in 2006, an increase of 153,570 people (8.5%) from 2001. The 2001 to 2006 population increase in Western Australia was the second highest of all states and territories, behind Queensland (11%), and higher than the national average (5.5%).

### ***Change of address (usual residence five years ago)***

Migration was the most significant contributor to Western Australia's population increase between 2001 and 2006. It is therefore not surprising that in the 2006 Census, almost one in ten (9% or 165,460) Western Australian residents (aged 5 years or older) indicated that their usual residence had been outside the state in 2001. The majority of these movers had been living overseas in 2001 (61%), while the remainder had lived in another state or territory (39%). Of the 64,370 people who had lived elsewhere in Australia in 2001, almost one-third had lived in New South Wales (29%), a further one-quarter in Victoria (24%) and 21% in Queensland.

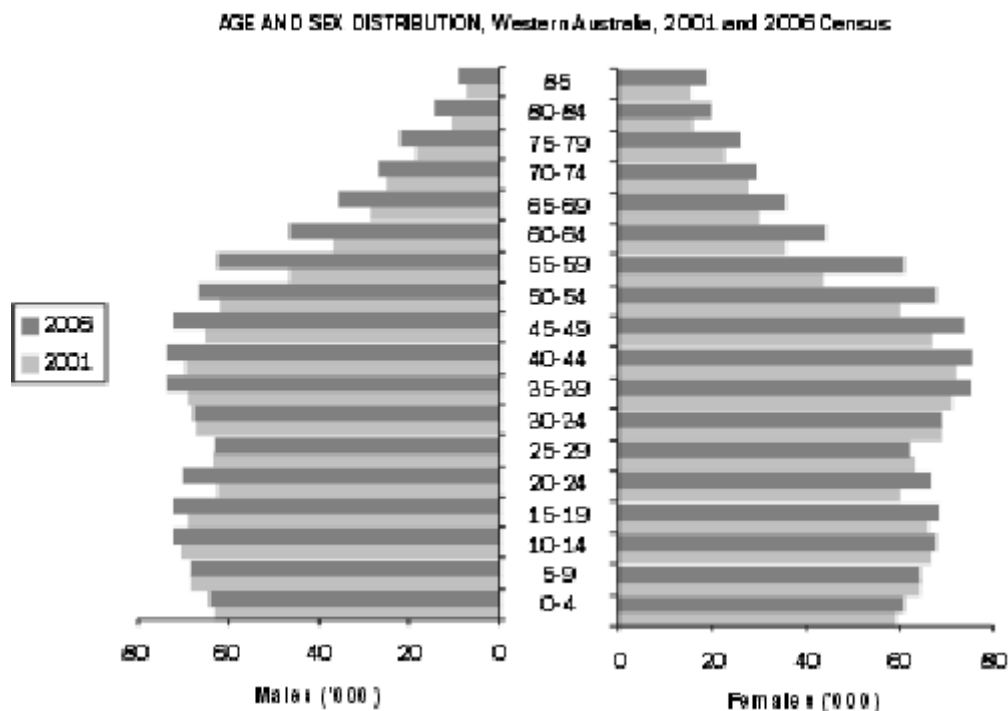
**WA CHANGE OF ADDRESS**, Inter-state movers (state or territory usual residence in 2001)



### ***Age and sex profile***

The median age for Western Australians in 2006 was 36 years, three years older than in 1996 (33 years). The changing proportions of children (less than 15 years) and older people (aged 65 years or more) highlights our ageing population. Between 1996 and 2006, the proportion of children in the state decreased from 23% to 20%, while the proportion of older people increased from 10% to 12%. Even though the number in both age groups grew over the ten year period, the increase in the number of older people was five times higher than that of children (57,900 and 11,400 persons respectively).

The increase in the number of females (76,030) residing in Western Australia was slightly less than that of males (77,540) between 2001 and 2006. This was reflected in the slight shift in the sex ratio which increased from 99.1 to 99.3 males per 100 females.



### ***Household and family composition***

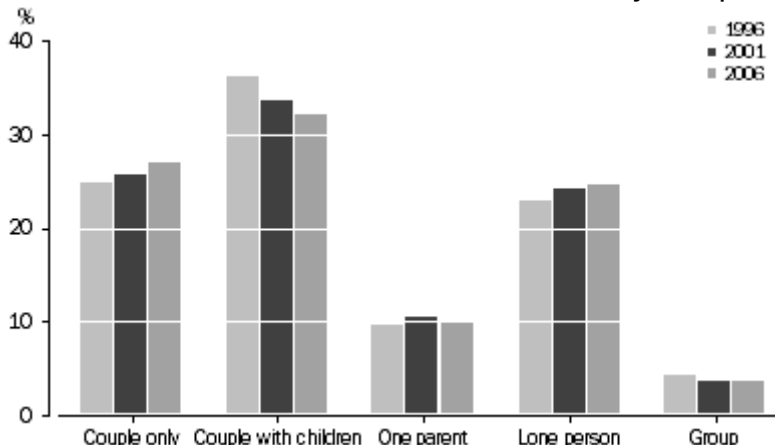
In 2006, there were 703,170 households in Western Australia, 6.6% more than were counted in the 2001 Census. While family households (72%) remained the dominant

household type in Western Australia, non-family households, such as lone person and group households, increased more rapidly between 2001 and 2006. Family households increased by 6% compared with 8% in the number of non-family households.

Families with children remained the largest household type in Western Australia in 2006, with one-third of all households being couples with children (32%) and a further 10% being one parent families. However, couple only families with no children experienced the largest growth of all household types, increasing by 12% (21,090 households) between 2001 and 2006. This increase was almost five times greater than the increase in couple with children households over the same period (2% or 4,540 households). The number of one parent households grew by 2% over this period, though the proportion decreased slightly (11% down to 10%). The large growth in couple only households can be partly attributed to an ageing population, with increasing numbers of households becoming 'empty nesters' as adult children leave home. The trend among younger adults starting families later could also be a contributing factor.

In 2006, more than one-quarter of households in Western Australia were non-family households (28% or 198,870 households). The majority were lone person households (87%), which had the second highest growth of all household types between 2001 and 2006 (8.3%). Group households, consisting of unrelated individuals living together, increased by 2% over the same period. The graph below shows how household types have changed as a proportion of total households counted in the 1996, 2001 and 2006 Census. Therefore the proportional changes represented are different from the changes discussed above, which identify changes between Censuses for individual household types.

**WESTERN AUSTRALIA, Household and family composition**



## **ALBANY - usual residence**

The City of Albany had a usual resident population of 31,580 in 2006, which is an increase of 9% since the 2001 Census and an increase of 15% since the 1996 Census. The growth in the population was slightly higher than the population growth for Western Australia (8.5%).

### ***Change of address (usual address five years ago)***

Almost one-third of Albany usual residents stated they lived at a different address outside the LGA five years prior to the 2006 Census (32% or 9,420). One in five residents had

previously lived in the Perth metropolitan area (22%) while 7% had lived in the surrounding LGAs of Denmark and Plantagenet and 5% in the South-West. A further 8% lived in another state or territory.

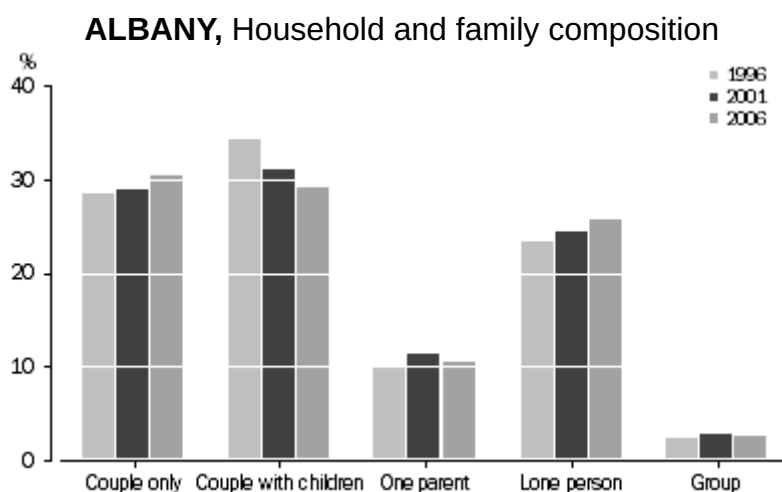
### ***Age and sex profile***

Albany had a high median age of 39 years, 3 years older than the WA median age (36 years). Albany's median age followed similar trends of other regional communities in Western Australia increasing by 2 years from 2001. Albany had a large proportion of its population over 65 years old (16% compared with 12% for Western Australia). The only other selected region which had a higher proportion of usual residents aged 65 years or older was Mandurah (20%).

Albany had a sex ratio of 97.8 males per 100 females, which was slightly lower than WA's 99.3 males per 100 females.

### ***Household and family composition***

The number of households in Albany grew by 7% between 2001 and 2006. Household types which increased the most were lone person households (13%) and couple only families (12%). The graph below shows how household types have changed as a proportion of total households counted in the 1996, 2001 and 2006 Census. Therefore the proportional changes represented are different from the changes discussed above, which identify changes between Censuses for individual household types.



### ***AVON ARC - usual residence***

In 2006 there were 22,100 usual residents living in the Avon Arc region, an 8% increase from 2001 and a 14.5% increase from 1996. There were considerable differences between the region's LGAs. In 2006, the largest number of residents in the Avon Arc lived in the Town of Northam (6,010) and the Shire of Toodyay (4,110) while the Shire of Beverley (1,560) had the smallest number. The Shire of Chittering experienced the largest increase in the region, growing by 28% from 2,750 to 3,520 between 2001 and 2006, proportionately more than three times the WA increase (8.5%). This LGA is located next to the Shire of Wanneroo which had the largest growth between 2001 and 2006 or all LGAs in Western Australia



(37%). Therefore the increases shown in the Shire of Chittering could reflect the expansion of the metropolitan area due to housing affordability and the availability of nearby service infrastructure in Wanneroo.

### ***Change of address (usual address 5 years ago)***

Although one in three residents in the Avon Arc had lived at a different address within or outside the region five years earlier (33%), the majority had resided in Western Australia (88%). Of these, 60% had moved from Perth, evidence the region is seen as a popular 'tree change' destination, with improved infrastructure access to the Perth metropolitan area.

### ***Age and sex profile***

The Avon Arc region had an older age structure compared to WA (median 41 years compared to 36 years). In 2006, the Shire of Beverley had the oldest median age in the region and in the state (49 years). All the other LGAs had median ages above the state average, except for the Town of Northam (36 years).

Between 2001 and 2006, the proportion of older residents (aged 65 years or more) living in the Avon Arc region increased from 12% to 14%. Overall the number of older people increased by almost one-quarter (23%). There was no change in the proportion of children aged under 15 years (22% for 2001 and 2006).

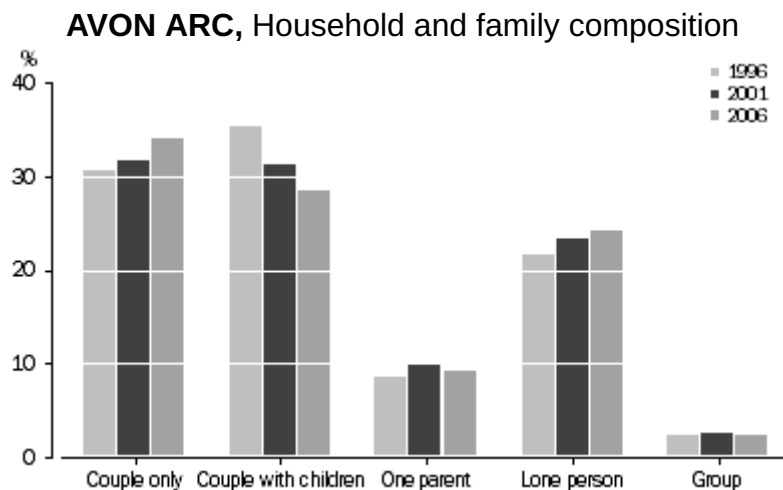
In 2006 the sex ratio of the Avon Arc region was 101.6 males for every 100 females, slightly above the state sex ratio of 99.3 males for every 100 females. The Shire of Beverley had the highest sex ratio in the Avon Arc region, with 107.4 males for every 100 females while the Town of Northam had the lowest, 95.4 males per 100 females.

### ***Household and family composition***

In 2006, there were 8,160 households in the Avon Arc region, an increase of 8% from 2001. The Shire of Chittering experienced the highest household growth of all LGAs (30%), followed by the Shire of Toodyay (11%). The Town of Northam was the only LGA in the region to experience a fall in the number of households between 2001 and 2006 (decrease of 2%).

Households were more likely to consist of couple only families (34%). There were also less couple families with children in the region compared to the state (28% compared to 33%). Couple only families experienced the highest increase of all selected households in the Avon Arc region between 2001 and 2006 (16%). This trend is consistent with the older age profile of the region, with many couple families likely to be 'empty nesters' whose children have left home. Lone person households made up almost one-quarter (24%) of the selected household group in Avon Arc region, a similar proportion for Western Australia (25%).

The graph below shows how household types have changed as a proportion of total households counted in the 1996, 2001 and 2006 Census. Therefore the proportional changes represented are different from the changes discussed above, which identify changes between Censuses for individual household types.



### **BROOME - usual residence**

In the 2006 Census there were 13,060 usual residents counted in the Shire of Broome, 6% (760 people) more than 2001 and an increase of 3,550 residents from 1996.

### ***Change of address (usual address 5 years ago)***

Almost one third of people living in Broome (aged 5 years and over) in 2006 had lived outside the shire in 2001 (32% or 3790 people). Of these, almost two-thirds had lived elsewhere in Western Australia (64%). It should be noted that Broome had a high proportion of persons who did not state their usual address five years ago (19% compared to 8% for Western Australia). Therefore, it is probable that a higher proportion of residents had lived outside of Broome in 2001.

### ***Age and sex profile***

The population of Broome had one of the youngest age profiles in Western Australia, with a median age of 32 years (36 years for Western Australia). Unlike most regions, the median age of Broome had not changed between 2001 and 2006. This is reflected in the higher proportion of children aged under 15 years (24% compared with 20% for Western Australia). Even though the proportion of children in Broome remained high between 2001 and 2006, the number of children declined from 3,210 to 3,140.

A lower proportion of people aged 65 years or older lived in Broome (5%) compared with Western Australia (12%). Another factor contributing to the younger age profile was the high proportion of Indigenous people living in the shire (3,560 or 27%). The median age of the Indigenous population was 22 years, 13 years lower than the non-Indigenous population (35 years).

The sex ratio of Broome residents was 106.8 males per 100 females.

### ***Household and family composition***

Between 2001 and 2006 there was only a 1% increase in the number of households in Broome (3,800 to 3,830 households), whereas visitor only and other non classifiable households increased by 27% (2,160 to 2,740). Broome also had the lowest proportion of family households of all the selected regions (69%). Lone person households in Broome had increased by 10% between 2001 and 2006.

Broome had the highest proportion of group households of all the selected regions (7% compared to 4% for Western Australia). It should be noted that the proportion of households in Broome that were not classified to a household type was considerably higher than the state average and therefore changes over time and comparisons with other regions should be used cautiously (42% compared to 7% for Western Australia).

## **BUNBURY - usual residence**

There were 54,970 usual residents counted in the Bunbury region in 2006, which has more than doubled since 1996 (26,700 persons). Most of this population increase occurred in the statistical local areas (SLAs) of Capel Part A (172%), Dardanup Part A (77%) and Harvey Part A (46%) which surround the City of Bunbury. The SLA of Capel Part A had the greatest population increase in the Bunbury region, almost tripling in size from 2,150 to 5,870 between 1996 and 2006.

### ***Change of address (usual address 5 years ago)***

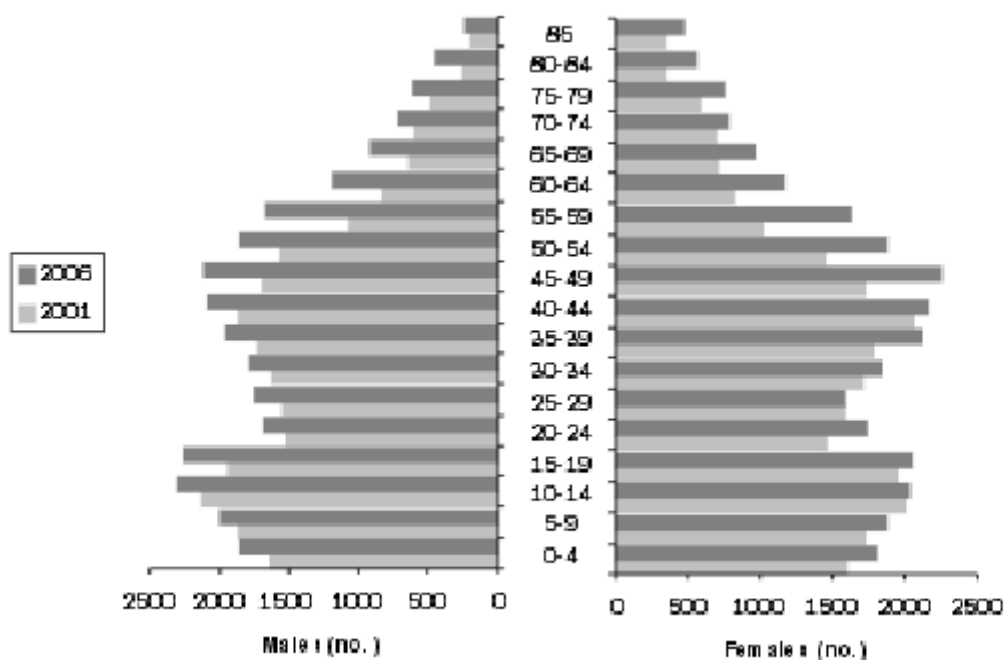
In 2006, approximately one in three persons living in the Bunbury region (under 5 years) had lived outside the area in 2001 (34% or 17,200). The majority had resided in Western Australia in 2001 (81%). Almost one-quarter had lived in other regions of the South-West (22%), in particular the SLAs of Capel Pt B, Harvey Pt B and Dardanup Pt B and the Shires of Collie and Busselton. Previous addresses also included the Perth metropolitan region (17%), another state or territory (9%) and overseas (10%).

### ***Age and sex profile***

The median age of usual residents in the Bunbury region, rose from 33 years in 2001 to 36 years in 2006. This increase is the result of a higher increase in the number of older people, aged 65 years or more (1,580 or 33%), compared with children aged 0-14 years (920 or 8%). The proportion of older people increased from 10% to 12% between 2001 and 2006, whereas the proportion of children decreased from 23% to 22%.

In 2006 there were 99.1 males for every 100 females residing in the Bunbury region, similar to the sex ratio for Western Australia and the region in 2001.

AGE AND SEX DISTRIBUTION, Bunbury, 2001 and 2006 Census



### ***Household and family composition***

In 2006, there were 19,490 households in the Bunbury region, an increase of 15% or 2,520 more than in 2001. This increase was proportionately more than twice that for Western Australia (7%). Family households accounted for three-quarters of all households (75%), a slightly higher proportion than the state average of 72%. Almost one-quarter of Bunbury households were lone person households (22%), the lowest proportion of all the selected regions.

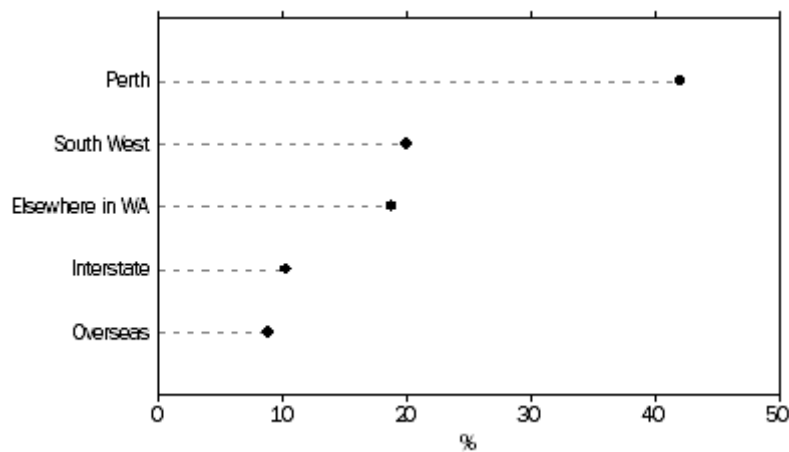
### **BUSSELTON - usual residence**

In 2006 there were 25,350 usual residents counted in the Shire of Busselton, 19% (4,020) more than in 2001 and 45% (7,910) more than in 1996.

### ***Change of address (usual address 5 years ago)***

In 2006, more than one in four Busselton residents (aged over 5 years) had resided outside the region in 2001 (28%). Of these, just under half (42%) had lived in the Perth metropolitan area, primarily in the LGAs of Joondalup, Stirling and Melville. A further 20% had previously resided in other areas of the South-West region, most commonly the LGAs of Augusta-Margaret River, Manjimup and Bunbury.

### **BUSSELTON CHANGE OF ADDRESS, usual residence in 2001**



### ***Age and sex profile***

In 2006, the median age of usual residents in Busselton was 38 years which was two years older than the median age for Western Australia (36 years). Over this period, the number of residents aged more than 65 years increased by almost one-third (30%), a higher rate than the state increase (18%), but lower than the growth of this age group in Mandurah (43%) and Bunbury (33%).

The number of children in Busselton also increased by 10% between 2001 and 2006, which was substantially higher than the overall increase of children in Western Australia (2%).

### ***Household and family composition***

The number of households in the Shire of Busselton grew by 16% between 2001 and 2006 (7,770 to 9,050 households). The largest numeric increase in household type was for couple only families, which grew by 500 households (21%) between 2001 and 2006.

In 2006, family households accounted for approximately three-quarters of households in Busselton. Couple families with children and couple only families were the largest household types (32% and 31% respectively). Lone person households represented 22% of households in Busselton, a smaller proportion than the Western Australia average (25%).

### **DALWALLINU - usual residence**

The Shire of Dalwallinu is located in the Wheatbelt region of Western Australia. Against the trend of population increase for Western Australia, many of the LGAs located in the Wheatbelt experienced population declines between 2001 and 2006. In 2006 the usual resident population of Dalwallinu was 1,370, a decline of 23% from 1,770 residents in 2001.

### ***Change of address (usual address 5 years ago)***

In 2006, residents of Dalwallinu were the least likely of all the selected regions to have been living outside the shire in 2001 (19%). Most Dalwallinu residents, who had lived elsewhere in 2001, had lived in the Perth metropolitan area (29%).

## ***Age and sex profile***

The age profile of Dalwallinu underwent a substantial change between 2001 and 2006. In 2001, Dalwallinu along with the Shire of Roebourne, had the youngest median age (31 years) of all the selected regions. By 2006, the median age of Dalwallinu residents increased by five years to 36 years (equal to the Western Australia median).

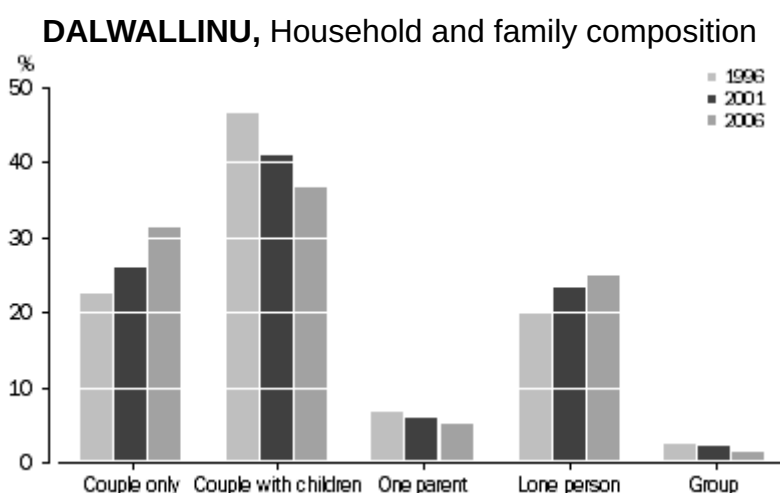
In 2001, the younger median age was largely due to the proportion of children (under 15 years) (28%). In 2006, while the proportion of children in Dalwallinu's population (24%) remained higher than the state average (20%), there were fewer children living in the area compared with 2001 (500 down to 320).

Dalwallinu had a male dominated population. In 2006, 111.3 males per 100 females lived in the Shire compared with 114.5 males per 100 females in 2001. As the population base is low, this is not a significant change with a similar percentage decline in both males and females over the 5 year period.

## ***Household and family composition***

Dalwallinu experienced a 13% decrease in the number of households counted between 2001 and 2006. By 2006, the number of households had fallen from 560 to 480. The proportion of couple with children families declined by 22% (50 households). While couple with children families continued to be the largest household type in Dalwallinu (37%), they represented fewer households compared to 2001 (41%).

The following graph shows how household types have changed as a proportion of total households counted in the 1996, 2001 and 2006 Census. Therefore the proportional changes represented are different from the changes discussed above, which identify changes between Censuses for individual household types.



## **GERALDTON - usual residence**

In 2006, there were 31,560 usual residents counted in the urban Geraldton region, an

increase of 8% from 2001 (29,180). Most of the population growth in the Geraldton region occurred in the SLA of Greenough Part A (14%), the urban area surrounding the City of Geraldton. The number of usual residents in the City of Geraldton increased less over the same period (3%).

### ***Change of address (usual address 5 years ago)***

In 2006, more than one in four usual residents had been living elsewhere within or outside the region in 2001 (27%), with the majority having previously lived in Western Australia (83%). Of these, 39% had lived in Perth, 11% in the Pilbara region and 6% in the Shire of Northampton.

### ***Age and sex profile***

In 2006, the median age of usual residents in the Geraldton urban region was 35 years, two years older than in 2001 (33 years). With 24% of its population aged under 15 years, Geraldton had a slightly higher proportion of children compared to the state (20%). The proportion of older residents (more than 65 years old) increased by 22% from 2001. Approximately three-quarters of people aged 65 years old or more in the region, lived in the City of Geraldton.

The sex ratio of the population was 96.7 males per 100 females, similar to the ratio in 2001.

### ***Household and family composition***

The number of households in the Geraldton region grew by just under 3% between 2001 to 2006 (10,610 to 10,890 households). Over the same period, the number of couple only families increased by 13%, while one parent families fell by 8% (1,360 down to 1,240 households).

## **KALGOORLIE - usual residence**

According to the 2006 Census, the urban area of Kalgoorlie/Boulder had a usual resident population of 28,240, an increase of 4% from the 2001 Census. This represented the smallest increase for all of the larger Western Australian urban localities.

### ***Change of address (usual address five years ago)***

In 2006, just under one-third of Kalgoorlie residents (aged over 5 years) were living elsewhere within or outside the region in 2001 (30%). Over half lived in Western Australia (56%) and a further one-quarter were previously living interstate (of these 50% were from Victoria and Queensland combined). Of all the selected regions, Kalgoorlie had the highest proportion of residents who had lived overseas five years before the 2006 Census (18%).

### ***Age and sex profile***

Kalgoorlie's population shared the youngest median age (31 years) with Leonora and



Roebourne (compared to 36 years for Western Australia). The median age for Kalgoorlie has followed the ageing trend in other regions, increasing by 2 years from 2001. Approximately one-quarter of Kalgoorlie's population were aged under 15 years and there was a relatively small proportion of older people (aged more than 65 years) (5% compared with 12% for WA).

Kalgoorlie had a higher ratio of males in the population with 108.8 males per 100 females. This compares with the Western Australia sex ratio of 99.3 males per 100 females. In the five years from 2001, the female population has grown slightly faster than the male population (5% and 3% respectively).

### ***Household and family composition***

Kalgoorlie had the lowest proportion of couple only households in the state (24% compared with 27% for Western Australia). This reflects the higher proportion of children living in couple with children families (37% compared to 32% for Western Australia).

### **LEONORA - usual residence**

In 2006, the Shire of Leonora recorded a usual resident population of 1,410, a fall of 27% from the 2001 Census. The population has almost halved since 1996 (a decrease of 47% or 1,260 residents).

### ***Change of address (usual address 5 years ago)***

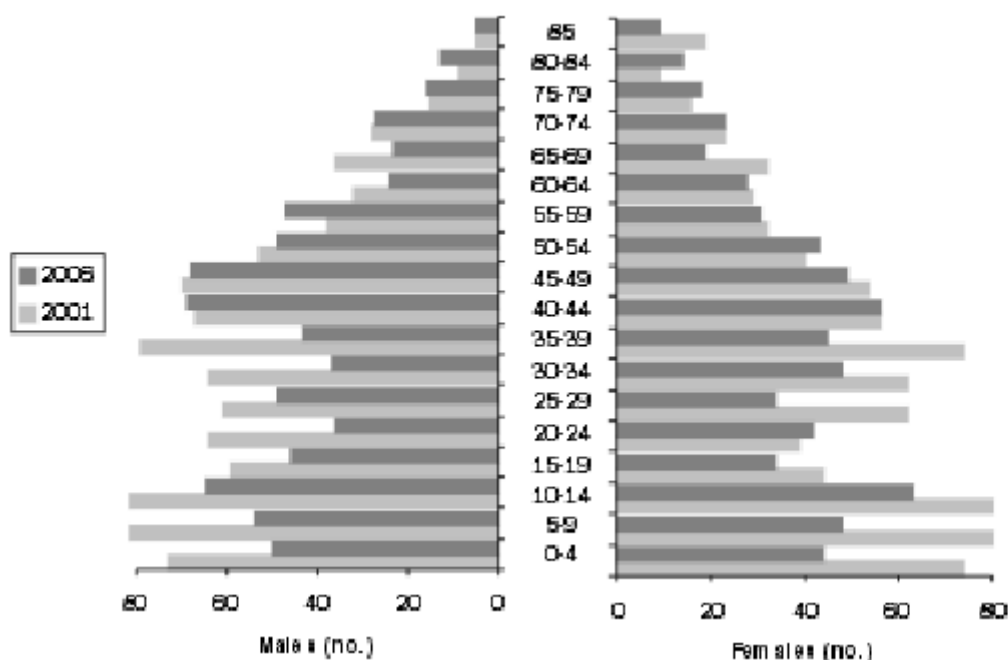
Due to the volatility of mining projects in mining regions such as Leonora, population turnover is normally high and is dependant on project venture timing. Therefore it is not surprising that over half of the usual resident population of Leonora had lived outside the LGA five years earlier (53%). More than one-third (35%) had previously lived in Perth and a further 27% in another state or territory.

### ***Age and sex profile***

In 2006, the median age of Leonora's residents was 31 years. While other selected regions had a median age increase from the 2001 Census, Leonora's median population age actually declined by 2 years. Leonora had a high proportion of under 15 year olds (25%). The over 65 year old population was one of the smallest of all the selected regions (3%).

Leonora had a very high young male population. In 2006, for every 100 females there were 142.8 males, the highest ratio for all the selected regions due to the mining industry. From 2001 this ratio had declined due to the number of males, rather than females, leaving the LGA (167.1 males per 100 females in 2001). The male population dropped by 380 residents (31%), while the female population declined by 20% (140 residents).

AGE AND SEX DISTRIBUTION, Leonora, 2001 and 2006 Census



### ***Household and family composition***

Leonora experienced a 10% decline in the number of households between 2001 and 2006 (430 down to 390 households). A high proportion of these households were persons living alone (26%), the highest proportion for all selected regions.

### **MANDURAH - usual residence**

In 2006, there were 67,790 usual residents counted in the Mandurah region, 21.5% (12,000) more than in 2001 and 40% (19,410) up from 1996. Most (85%) of this population growth occurred in the City of Mandurah, which increased its usual resident count by 10,220 people. The Mandurah region grew at more than twice the rate for Western Australia (22% and 8.5% respectively) and had the highest growth of all the selected regions between 2001 and 2006.

### ***Change of address (usual address 5 years ago)***

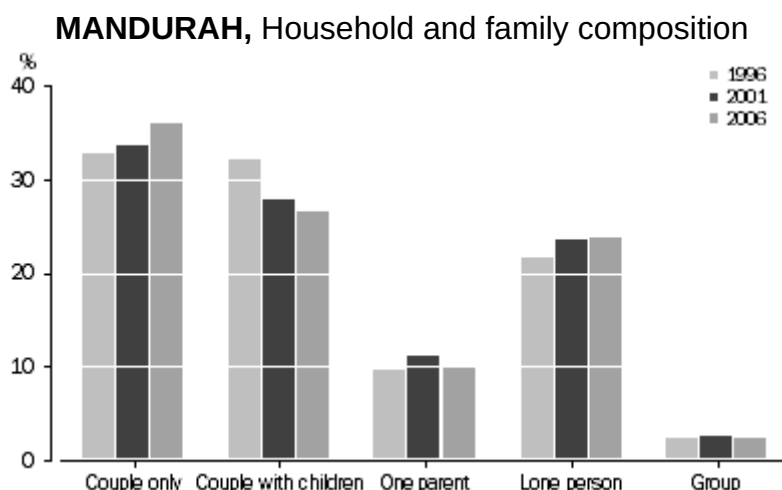
Nearly one-third (30%) of Mandurah residents in 2006 had lived elsewhere within or outside the region in 2001. Of the people moving into Mandurah, 78% had previously lived elsewhere in Western Australia, with more than half from the Perth metropolitan area (56%). Coupled with age profile data, the mobility trend highlights Mandurah as a 'sea change' and retirees destination.

### ***Age and sex profile***

Mandurah's population had a median age that was 9 years higher than the WA average (43 years compared to 36 years). Between 2001 and 2006 the median age had risen by 3 years, resulting from the population aged under 15 years decreasing from 21% to 19% and the proportion of those aged 65 years or older increasing from 18% to 20%.

## **Household and family composition**

Mandurah had the highest growth rate in the number of households in Western Australia between 2001 and 2006 (18% compared to 9% for Western Australia), resulting in an increase of 3,850 households for the region. The number of couple only households grew by 26% and the number of lone person households grew by 20%. The graph below shows how household types have changed as a proportion of total households counted in the 1996, 2001 and 2006 Census. Therefore the proportional changes represented are different from the changes discussed above, which identify changes between Censuses for individual household types.



## **ROEBOURNE - usual residence**

In 2006, the Shire of Roebourne usual resident population was counted as 16,420, an increase of 15% (2,170) from 2001. This was the largest growth in population outside the selected South-West areas of Mandurah, Bunbury and Busselton. Most residents in the Shire of Roebourne lived in the urban centre of Karratha (11,720 residents), which increased by 9% between 2001 and 2006.

### ***Change of address (usual address 5 years ago)***

In 2006, 6,000 or 40% of usual residents living in Roebourne had not lived in the LGA five years earlier, the highest proportion of all the selected regions. Over one third (35%) of these residents had been living in Perth, while 22% had lived in another state or territory. A further 10% had been living overseas in 2001. Karratha had similar figures to the Shire of Roebourne with 44% of the population living elsewhere in 2001. However, it should be noted that 16% (2,410) of Roebourne residents did not answer the Census question on where they lived 5 years earlier, therefore, the number of people who had lived somewhere else in 2001 could be higher.

## **Age and sex profile**

In 2006, the median age of Roebourne's usual resident population remained unchanged from 2001 (31 years). The median age in 2006 was five years younger than the Western Australia average of 36 years. Karratha residents had a slightly younger age profile with a

median age of 30 years in 2006. Among all the selected regions, Roebourne had the highest proportion of children (aged 0-14 years) within its population, 24% or 3,920 people. Like most of the other selected regions, the proportion of children declined from 2001 (28%), though it remained substantially higher than the Western Australian average (20%). Roebourne's lower median age also resulted from far fewer older residents (aged 65 years or more) (2% compared to 12% for Western Australia).

The sex ratio among usual residents of Roebourne was relatively constant between 2001 and 2006 at 117 males per 100 females. Only Leonora had a higher male to female ratio of the selected regions in 2006.

### ***Household and family composition***

In 2006, there were 4,690 households in the Shire of Roebourne, an increase of 5% (200) since 2001. Over this period, the number of couple only families rose by 13% (150), whereas one parent households decreased by 11%. Like the Shire of Broome, there was a high proportion of visitor only or unclassifiable households (23% or 1,400 households), therefore changes over time and comparisons with other regions should be used cautiously.

## **REGIONAL COMPARISONS**

### **Age and sex profile**

As the following table illustrates, there are many differences between the selected regions in this article. The Mandurah region had the highest median age (43 years), which is reflected in the proportion of people aged 65 years or more (20.3%). Conversely Roebourne, Leonora, Kalgoorlie and Dalwallinu had the youngest age profile (median 31 years). The sex ratio for these regions have a higher proportion of males than females, which highlights the attraction of young males to employment in the mining and farming industries.

**AGE AND SEX PROFILE, Regional comparison, 2006 Census**

	Median Age	Aged under 15 years	Aged over 65 years	Sex Ratio Males per 100 females
	years	%	%	ratio
Albany (C)	39	20.6	16.1	97.8
Avon Arc	41	21.6	14.1	101.6
Broome (S)	32	24.1	4.5	106.8
Bunbury (SSD)	33	21.6	11.7	99.1
Busselton (S)	38	21.9	15.3	97.3
Dalwallinu (S)	31	23.8	12.6	111.3
Geraldton (SSD)	33	23.7	11.8	96.7
Kalgoorlie (SSD)	31	24.9	5.2	108.8
Leonora (S)	31	24.1	3.4	142.8
Mandurah (SSD)	43	18.9	20.3	96.6
Roebourne (S)	31	25.9	1.9	117.0
<b>Western Australia</b>	<b>36</b>	<b>20.2</b>	<b>12.0</b>	<b>99.3</b>

Published 2006 Census Quickstats data.

### **Household and family composition**

Closely related to a region's age and sex profile are the types of household and family formations. Mandurah and the Avon Arc regions had a higher proportion of couple only families (36% and 34% respectively). As their age profiles are older, 'empty nesters' are more prevalent which is further supported by the regions' popularity with retirees looking for a sea or tree change. The regions that have a younger age profile share a close correlation with higher proportions of couple with children families. The Shire of Roebourne had the highest proportion of couple with children families (44%) which is reflected in the higher proportion of children aged under 15 years (26%). Lone person households can reflect either an ageing or a younger population. The Shire of Leonora had the highest proportion of lone person households (26%), which due to the mining industry, probably reflects young male lone person households. Albany also had a relatively high proportion of lone person households, however this probably reflects older persons living alone, due to the higher proportion of people aged 65 years or more (16%).

### HOUSEHOLD AND FAMILY COMPOSITION, Regional comparison, 2006 Census

	Couple only %	Couple with children %	One parent %	Lone person %	Group %
Albany (C)	30.4	29.2	10.6	25.7	2.6
Avon Arc	34.1	28.4	9.2	24.3	2.4
Broome (S)	25.5	29.4	10.6	24.0	6.5
Bunbury (SSD)	28.6	33.6	11.0	22.3	2.8
Busselton (S)	31.4	31.9	10.0	22.4	2.9
Dalwallinu (S)	31.4	36.6	5.2	24.8	1.4
Geraldton (SSD)	28.1	32.2	11.4	23.9	2.6
Kalgoorlie (SSD)	24.4	36.6	10.2	23.3	4.3
Leonora (S)	26.2	36.8	7.7	26.2	3.1
Mandurah (SSD)	35.9	26.5	9.8	23.9	2.4
Roebourne (S)	27.2	43.9	7.1	17.4	3.5
<b>Western Australia</b>	<b>27.1</b>	<b>32.2</b>	<b>10.1</b>	<b>24.7</b>	<b>3.6</b>

Published 2006 Census table data.

### FURTHER DATA

The data included in this article has been sourced primarily from published 2006 Census and Estimated Resident Population data which is available for free from our website. For information on how to source this data, please contact the National Information and Referral Service on 1300 135 070.

## Retail industry in Western Australia (Feature Article)

### FEATURE ARTICLE 2: RETAIL INDUSTRY IN WESTERN AUSTRALIA

#### INTRODUCTION

The retail industry employs more workers (150,000) than any other industry in Western Australia and accounts for around 5% (\$6 billion) of Gross State Product (GSP) each year. Retail trade has been the focus of much discussion and review in Western Australia in

recent years, as it remains the only state without extended retail trading hours. This article will examine various performance indicators of Western Australia's retail industry during a decade of restricted trading hours and will compare it to the performance of other states where trading laws have been deregulated.

## **RETAIL TRADING HOURS IN WESTERN AUSTRALIA**

The **Retail Trading Hours Act 1987** applies to retail shops in Western Australia south of the 26th parallel. Retail trading hours are set down for three categories of retail: general retail shops; small shops (exempted general retail shops); and special retail shops. The trading hours of restaurants, cafes and takeaway food shops are not covered by the Act.

General retail shops are all retail businesses that are not categorised as either small shops or special retail shops. They are allowed to trade between 8.00am and 6.00pm on Monday, Tuesday, Wednesday and Friday, between 8.00am and 9.00pm on Thursday and between 8.00am and 5.00pm on Saturday. These shops cannot open on Sundays or public holidays.

Expanded general retail hours are available to car yards; shops in the central tourism precincts of Perth and Fremantle; those outside of the Perth metropolitan area and metropolitan local government authorities; and metropolitan shopping centres during special events. By comparison, general retail shops in other states and territories are permitted to trade, without restriction, seven days a week. Perth is the only capital city with restricted Sunday trading.

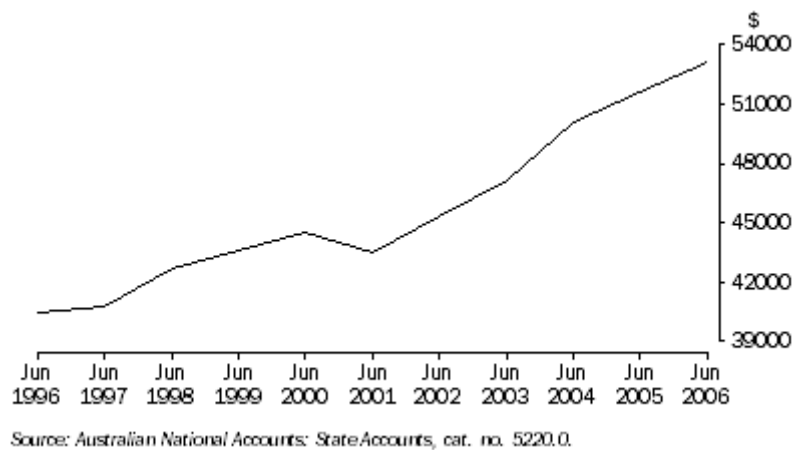
Small shops, or exempted general retail shops, are shops owned by up to six people who operate no more than three retail shops, and in which a maximum of ten people work at any one time. They may sell goods other than motor vehicles. They are permitted to trade up to 24 hours a day and seven days a week.

Special retail shops are considered necessary for emergency, convenience or recreational supplies and include newsagencies, bookshops, pharmacies, garden nurseries, hardware, home improvement shops, video shops, art and craft shops, souvenir shops, duty free shops, shops at sporting venues, boating shops, motor vehicle spare parts shops and shops at international standard hotels. These shops may trade between 6.00am and 11.30pm seven days a week. Service station trading hours are completely deregulated in all areas.

## **ECONOMIC GROWTH AND HOUSEHOLD CONSUMPTION SPENDING**

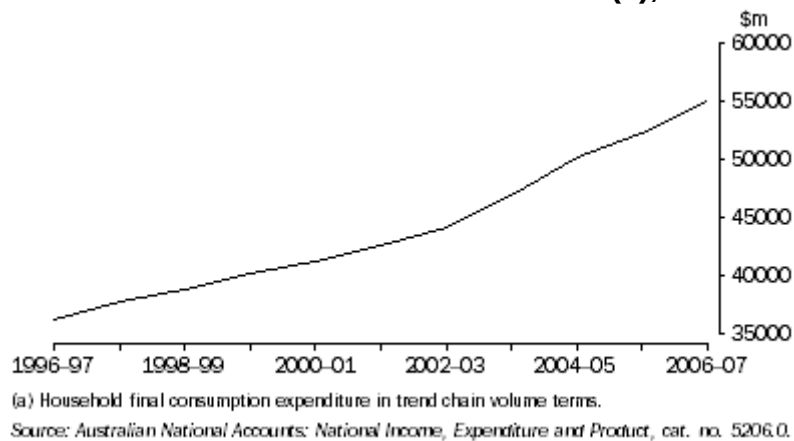
It is important to note that this analysis of Western Australia's retail industry is during a period of strong economic growth having a positive impact on retail spending. The retail industries of some other states have not had the same positive influence (with the exception of Queensland). A decade of strong economic growth in Western Australia, particularly over the 5 years from 2001 to 2006, has helped fuel retail spending in the state. GSP per capita increased 31% (\$12,600) to \$53,000 in Western Australia from June 1996 to June 2006.

**REAL GROSS STATE PRODUCT PER CAPITA, Western Australia**



Strong economic growth led to increased spending by households between 1996-97 and 2006-07. Much of household spending, which rose 52% (\$19 billion), or 4% (\$2 billion) per year (on average) in real terms, was directed toward the retail industry.

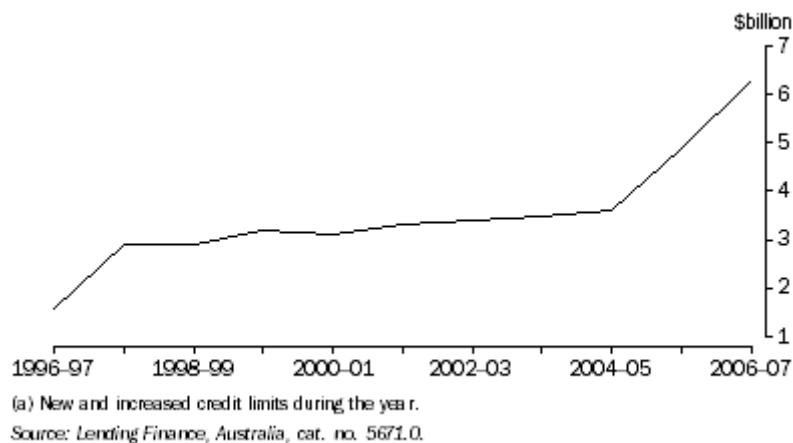
### REAL HOUSEHOLD CONSUMPTION SPENDING(a), Western Australia



## USE OF CREDIT

Further fuelling growth in household spending has been the greater use of credit and personal loans to fund consumption expenditure in Western Australia between 1996-97 and 2006-07. Revolving credit (or the value of new and increased credit limits) quadrupled (up 298%) to \$6.3 billion in current terms in Western Australia, with much of that growth occurring in the last two years. The value of fixed personal loans for the purchase of household goods doubled from 1996-97 to 2006-07 (up 97% to \$0.2 billion) and personal loans for motor vehicles rose 20% to \$1.4 billion.

### VALUE OF REVOLVING CREDIT(a), Western Australia

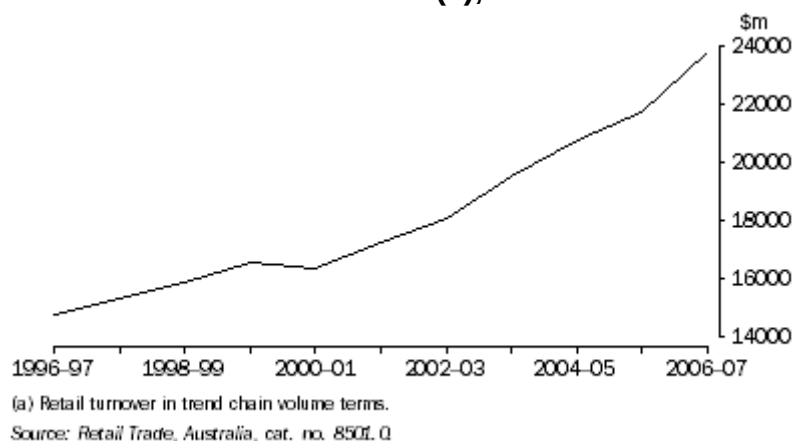


## RETAIL TURNOVER BY INDUSTRY GROUP

Over the 10 years to 2006-07, retail turnover in Western Australia rose by 61% (\$9 billion) to \$24 billion in real terms. On average, retail turnover grew 5% (\$900 million) per year. There was a small decline in retail turnover of 1.2% (\$196 million) in 2000-01 coinciding with the introduction of the GST. Retail turnover, at the national level, rose by 52% over the 10 year period.

Western Australia recorded the equal second highest rate of increase in retail turnover along with Victoria (61%). Queensland (72%) had the greatest proportionate rise. The remaining states of New South Wales (36%), Tasmania (43%) and South Australia (49%) recorded significantly lower increases.

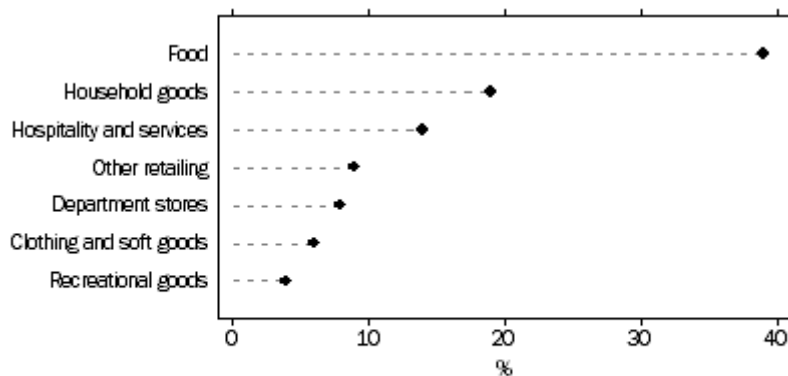
### REAL RETAIL TURNOVER(a), Western Australia



In 2006-07, Western Australia's retail spending was mainly on food (39%), household goods (19%) and hospitality and services (14%). These proportions were much the same as in 1996-97. Food retailing includes supermarkets, grocery stores, takeaway food outlets and other specialised food retailing. Household goods retailing comprises furniture, floor coverings and domestic hardware, houseware, appliances and recorded music. Hospitality and services consists of hotels, licensed pubs, cafes, restaurants and services such as video hire outlets, hairdressing and beauty salons.

### RETAIL TURNOVER(a) BY INDUSTRY GROUP, Western Australia - 2006-07



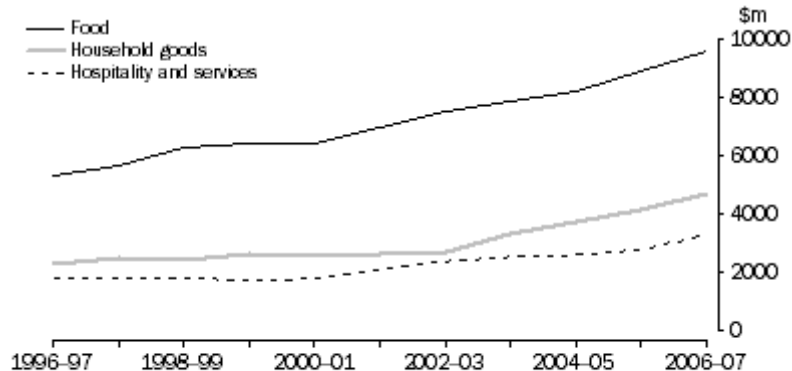


(a) Retail turnover in trend current price terms.

Source: Retail Trade, Australia, 8501.0.

The industry groups of food, household goods and hospitality and services drove most (74%) of the growth in retail turnover in Western Australia between 1996-97 and 2006-07. Food retailing increased \$4.3 billion (81%), household goods retailing rose \$2.4 billion (106%) and hospitality and services grew \$1.5 billion (87%).

#### RETAIL TURNOVER(a) BY INDUSTRY GROUP, Western Australia



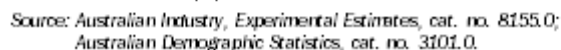
(a) Retail turnover in trend current price terms.

Source: Retail Trade, Australia, cat. no. 8501.0

#### SUMMARY OF RETAIL TRADE OPERATIONS BY STATE

Western Australia accounted for 10% (\$34 billion) of the total income generated by the Australian retail industry in 2005-06. This proportion was in line with Western Australia's share of the Australian population in June 2006 (10%). The larger retail markets of New South Wales (32%), Victoria (25%) and Queensland (20%) also had shares about equal to their proportion of the Australian population. Therefore, despite Western Australia's restricted retail trading hours, its retail industry generated an equal share of national retail income relative to the size of its population.

#### RETAIL TRADE INCOME AND POPULATION(a), By state, Proportion of Australian total - 2005-06



	2002-03	2003-04	2004-05	2005-06	Change 2002-03 to 2005-06	% change 2002-03 to 2005-06
	(\$Million)	(\$Million)	(\$Million)	(\$Million)	(\$Million)	%
NEW SOUTH WALES						
Wages and salaries	9 598	9 847	10 393	10 790	1 192	12.4
Total income	93 979	97 017	104 151	104 438	10 759	11.5
Total expenses	91 450	94 421	100 989	100 819	9 369	10.2
Operating profit before tax	2 877	3 259	3 609	3 753	879	30.4
VICTORIA						

Wages and salaries	6 892	7 360	7 779	8 347	1 455	21.1
Total income	66 971	73 550	78 300	81 904	14 933	22.3
Total expenses	65 053	71 531	75 664	78 901	13 848	21.3
Operating profit before tax	2 271	2 748	3 048	3 201	930	41.0
<b>QUEENSLAND</b>						
Wages and salaries	5 307	5 654	6 228	6 541	1 234	23.3
Total income	52 726	57 398	66 736	64 143	11 417	21.7
Total expenses	51 051	55 377	64 387	61 619	10 568	20.7
Operating profit before tax	2 021	2 496	2 827	2 792	771	38.1
<b>SOUTH AUSTRALIA</b>						
Wages and salaries	1 944	2 071	2 236	2 490	546	28.1
Total income	18 961	20 905	22 897	23 860	4 899	25.8
Total expenses	18 337	20 153	22 152	22 900	4 563	24.9
Operating profit before tax	730	841	859	994	264	36.2
<b>WESTERN AUSTRALIA</b>						
Wages and salaries	2 689	2 871	3 205	3 279	590	21.9
Total income	26 711	30 713	34 706	33 672	6 961	26.1
Total expenses	25 851	29 581	33 290	32 200	6 349	24.6
Operating profit before tax	1 044	1 348	1 676	1 696	652	62.5
<b>TASMANIA</b>						
Wages and salaries	542	614	660	708	166	30.6
Total income	5 388	6 150	6 717	6 757	1 369	25.4
Total expenses	5 192	5 907	6 403	6 446	1 254	24.2
Operating profit before tax	235	283	361	319	84	35.7

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Australian Industry, Experimental Estimates, cat. no. 8155.0.

## AVERAGE RETAIL COMMODITY PRICES

Perth consumers generally pay more for retail commodities than consumers in other state capital cities. Across a range of 52 selected retail commodities, Perth had the highest average price for 20 (39%) of those items in the June quarter 2007, followed by Hobart with 14 (27%). Other cities had highest average prices ranging from 4 items (8%) in Adelaide to 8 items (15%) in Melbourne.

In the June quarter 2007, Perth consumers paid the highest average prices across the states for meat; processed fruit and vegetables; and alcoholic drinks. In particular, they paid more for lamb chops (\$0.37 more per kg); pork chops (\$0.84 more per kg); chicken (\$0.57 more per kg); sausages (\$0.30 more per kg); and bacon (\$1.00 more per 250g).

Perth consumers also paid more for processed peaches (\$0.14 more per 825g); pineapples (\$0.09 more per 450g); and peas (\$0.03 more per 500g), as well as low alcohol beer (\$3.63 more per carton); full strength beer (\$0.86 more per carton); and a nip of scotch in a public bar (\$0.67 more per 30ml). Among the state capitals, Perth consumers also paid the highest average retail prices for cheese; flour; rice; oranges; bananas; eggs; baby food; toilet paper; low alcohol draught beer served in public bars; and toilet soap.

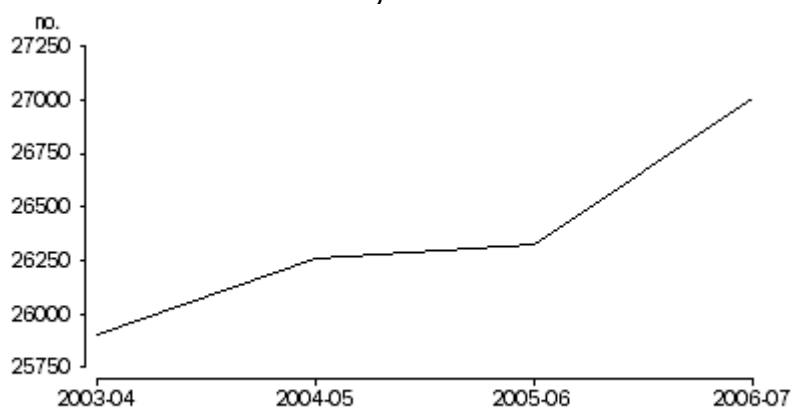
However, consumers in Perth paid the lowest average retail prices across the states for biscuits (\$0.13 less per 250g); rump steak (\$1.19 less per kg); carrots (\$0.39 less per kg);

onions (\$0.19 less per kg); chocolate (\$0.43 less per 250g); and dishwashing detergent (\$0.29 less per 450ml) in the June quarter 2007.

## NUMBER OF BUSINESSES OPERATING IN RETAIL TRADE

There were 27,000 businesses operating in Western Australia's retail industry in 2006-07, 4% (1,100) more than in 2003-04. This growth rate was the second highest among the states behind Queensland with 6% (2,900). The remaining states had much lower rates of growth in retail business numbers, ranging from 1% (800) in New South Wales to 3% (2,300) in Victoria.

### NUMBER OF BUSINESSES, Retail trade - Western Australia



Source: Counts of Australian Businesses, cat. no. 8165.0.

In 2006-07, Western Australia's retail industry was divided into personal and household goods retailing (41%), motor vehicle retailing and services (22%), food retailing (19%) and accommodation, cafes and restaurants (18%).

### CONCENTRATION OF BUSINESSES, Retail trade - Western Australia - 2006-07



Source: Counts of Australian Businesses, cat. no. 8165.0.

Among personal and household goods retailing, other personal and household goods retailing had the most operating businesses (4,563), including retailing n.e.c. (2,352), domestic appliance retailing (1,224) and clothing retailing (1,044). Food retailing mainly comprised businesses in specialised food retailing (4,455), with almost half being takeaway food retailing (2,094). There were many more businesses in motor vehicle services (5,133) than motor vehicle retailing (732), while cafes and restaurants (2,793) dominated

accommodation, cafe and restaurant retailing.

### RETAIL TRADE, Counts of Businesses, Western Australia, 2006-07

		Business Counts	
		No.	%
Food			
	Supermarket and grocery stores	705	2.6
	Specialised food	4 455	16.5
	<i>Total</i>	5 160	19.1
Personal and household goods			
	Personal and household goods		
	Department stores	24	0.1
	Clothing and soft goods	1 362	5.0
	Furniture houseware and appliances	2 775	10.3
	Recreational goods	1 623	6.0
	Other personal and household goods	4 563	16.9
	Household equipment repair services	654	2.4
	<i>Total</i>	11 001	40.7
Motor vehicles			
	Motor vehicles	732	2.7
	Motor vehicle services	5 133	19.0
	<i>Total</i>	5 865	21.7
Accommodation, cafes and restaurants			
	Accommodation	1 329	4.9
	Pubs, taverns and bars	591	2.2
	Cafes and restaurants	2 793	10.3
	Clubs (Hospitality)	270	1.0
	<i>Total</i>	4 983	18.4
<b>Retail trade - Total</b>		<b>27 009</b>	<b>100.0</b>

Counts of Australian Businesses, cat. no. 8165.0.

The industry classes, within the industries listed above, that recorded the largest increases in business numbers in Western Australian retail trade between 2003-04 and 2006-07 were cafes and restaurants (243 or 10%); takeaway food retailing (222 or 12%); clothing retailing (138 or 15%); automotive repair and services n.e.c. (135 or 5%); and car retailing (114 or 28%). There were major declines, however, in automotive fuel retailing (down 135 or 21%) and domestic appliance retailing (down 114 or 9%).

### SMALL BUSINESS IN THE RETAIL INDUSTRY

More than half (52% or 14,040) of the businesses operating in Western Australia's retail industry in 2006-07 were small businesses (1-19 employed persons). The remainder were non-employing businesses (38% or 10,347), medium-sized businesses (20-199 employed persons) (10% or 2,556) and large businesses (200 or more employed persons) (0.3% or 93).

### RETAIL TRADE, Number of Small Businesses (1-19 employed persons)

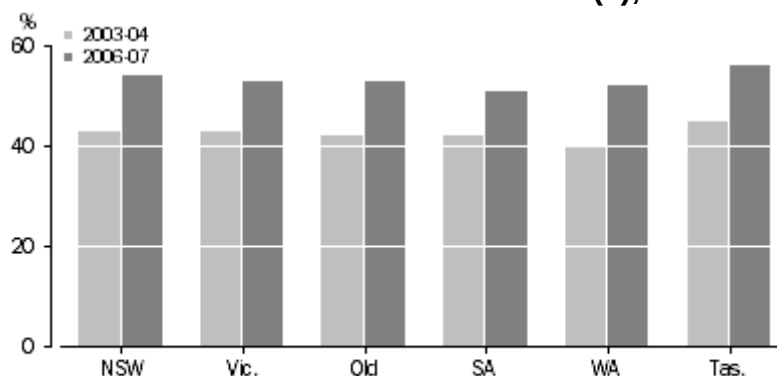
	2003-04	2004-05	2005-06	2006-07	Change from 2003-04 to 2006-07	
					No.	%
NEW SOUTH WALES						
Small businesses (no.)	39 720	46 704	48 471	50 313	10 593	26.7
Proportion of total businesses (%)	43	51	52	54	11 pts	na

<b>VICTORIA</b>						
Small businesses (no.)	28 569	33 663	34 701	36 723	8 154	28.5
Proportion of total businesses (%)	43	49	51	53	10 pts	na
<b>QUEENSLAND</b>						
Small businesses (no.)	21 768	26 109	27 690	29 265	7 497	34.4
Proportion of total businesses (%)	42	49	51	53	11 pts	na
<b>SOUTH AUSTRALIA</b>						
Small businesses (no.)	7 959	9 279	9 405	9 780	1 821	22.9
Proportion of total businesses (%)	42	48	49	51	9 pts	na
<b>WESTERN AUSTRALIA</b>						
Small businesses (no.)	10 476	12 375	13 107	14 040	3 564	34.0
Proportion of total businesses (%)	40	47	50	52	12 pts	na
<b>TASMANIA</b>						
Small businesses (no.)	2 856	3 258	3 453	3 597	741	25.9
Proportion of total businesses (%)	45	51	53	56	11 pts	na

Counts of Australian Businesses, cat. no. 8165.0.

In 2006-07, the proportion of small businesses operating in Western Australia's retail industry (52%) was similar to the proportion operating in the retail industries of New South Wales (54%), Victoria (53%), Queensland (53%), South Australia (51%) and Tasmania (56%). All states recorded increased proportions of small retail businesses between 2003-04 and 2006-07: New South Wales (43% to 54%), Victoria (43% to 53%), Queensland (42% to 53%), South Australia (42% to 51%), Western Australia (40% to 52%), narrowly the highest proportionate increase, and Tasmania (45% to 56%).

#### PROPORTION OF SMALL BUSINESSES(a), Retail trade

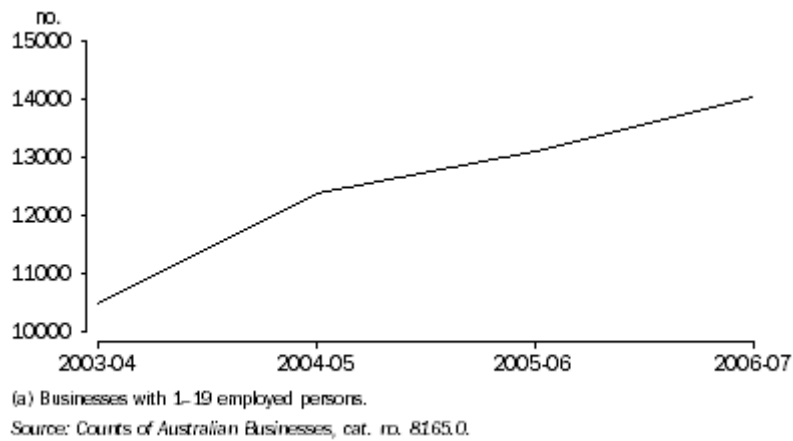


(a) Businesses with 1-19 employed persons.

Source: Counts of Australian Businesses, cat. no. 8165.0.

The number of small businesses operating in Western Australia grew by 34.0% (3,564) between 2003-04 and 2006-07, the second highest percentage rise after Queensland (34.4% or 7,497). Growth in retail small business in other states ranged from just under 23% (1,821) in South Australia to 29.5% (8,154) in Victoria.

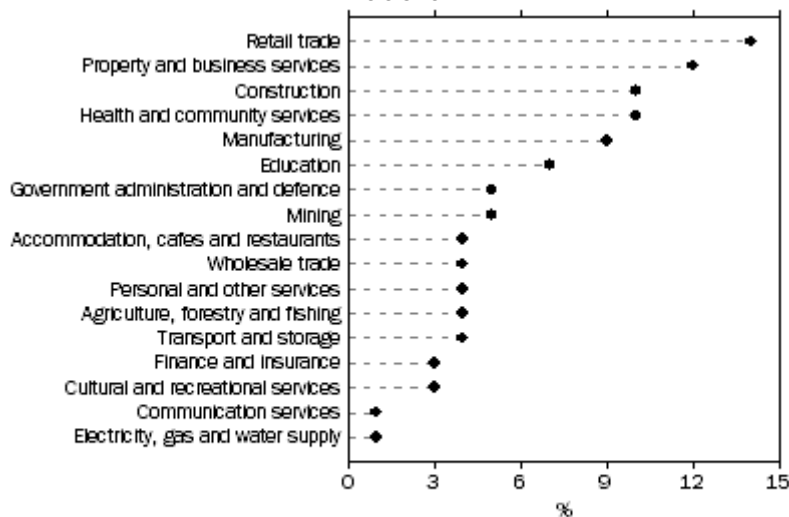
#### NUMBER OF SMALL BUSINESSES(a), Retail trade - Western Australia



## EMPLOYMENT

Retail trade employs more people in Western Australia than any other industry. In 2006-07, 14% (155,000) of workers were employed in retail trade (201,500 when including accommodation, cafes and restaurants), followed by property and business services (12%), construction (10%) and health and community services (9.6%). These results were very similar to the Australian average where retail trade (14%), property and business services (12%) and manufacturing (10%) accounted for the highest proportions of employed persons in 2006-07.

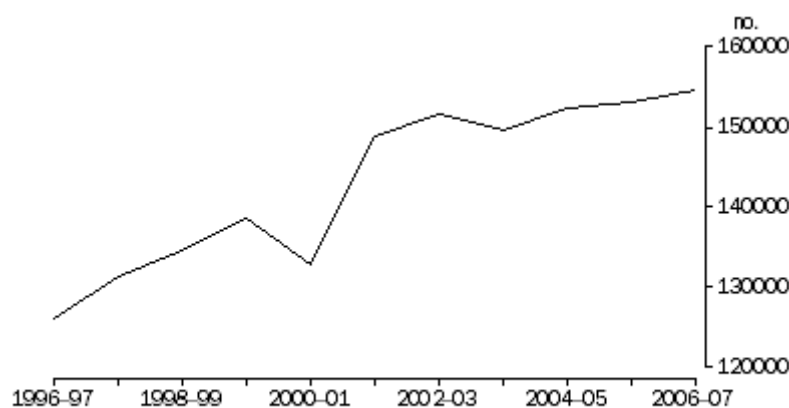
### PROPORTION OF WESTERN AUSTRALIA'S TOTAL EMPLOYMENT, By industry - 2006-07



Source: Labour Force, Australia, cat. no. 6202.0.

Between 1996-97 and 2006-07, retail industry employment grew by nearly 23% (28,400) in Western Australia, higher than the national rise of 21%. Among the states, Western Australia's percentage growth ranked second behind Queensland with 34% (83,100). The remaining states recorded growth ranging from 8% (2,600) in Tasmania to 20% (18,300) in South Australia. The larger states of New South Wales (19% or 74,800) and Victoria (15% or 47,700) recorded increases below the Australian average (21%).

### TOTAL EMPLOYED PERSONS, Retail trade - Western Australia



Source: Labour force, Australia, cat. no. 6202.0.

In 2006-07, employment in Western Australia's retail industry (including accommodation, cafes and restaurants) was concentrated in specialised food retailing (16% or 32,000), supermarket and grocery stores (14% or 27,000) and cafes and restaurants (12% or 23,000).

### NUMBER OF EMPLOYED PERSONS, Retail Industry, Western Australia

Selected industry group	1996-97	2006-07	Change 1996-97 to	% change 1996-97 to
	No.	No.	2006-07	2006-07
			No.	%
Specialised food retailing	22 317	31 773	9 456	42.4
Supermarket and grocery stores	22 895	27 435	4 541	19.8
Cafes and restaurants	18 599	23 381	4 781	25.7
Motor vehicle services	22 471	17 618	-4 853	-21.6
Furniture, houseware and appliance retailing	11 442	17 221	5 779	50.5
Other personal and household good retailing	15 225	15 778	553	3.6
Accommodation	10 845	13 353	2 508	23.1
Clothing and soft good retailing	8 827	11 448	2 620	29.7
Department stores	9 163	10 226	1 063	11.6
Recreational good retailing	6 662	8 523	1 861	27.9
Motor vehicle retailing	5 296	8 419	3 123	59.0
Pubs, taverns and bars	5 433	8 308	2 875	52.9
Household equipment repair services	1 693	1 945	252	14.9
Clubs (hospitality)	2 355	1 612	-743	-31.6

Labour Force, Australia, cat. no. 6202.0.

Between 1996-97 and 2006-07, employment growth was highest in specialised food retailing (up 9,456 or 42.4%), followed by furniture, houseware and appliance retailing (up 5,779 or 50.5%) and cafes and restaurants (up 4,781 or 25.7%). There were two industry groups showing declines in employment over the period: motor vehicle services (down 4,853 or 21.6%) and clubs (down 743 or 31.6%).

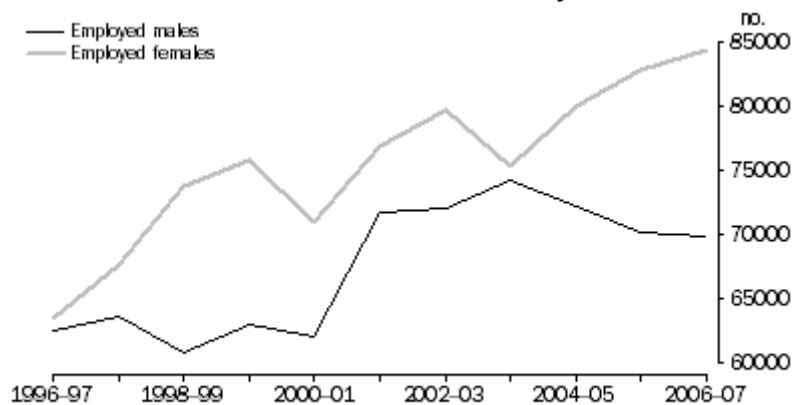
### MIX OF MALE-FEMALE WORKERS

In 2006-07, there were approximately 14,400 more females (84,400) employed in Western Australia's retail industry than males (70,000). Females accounted for 55% of employed



persons and males 45%. Female employment grew 33% (21,000) between 1996-97 and 2006-07, almost three times the rate of male employment (up 12% or 7,000). In 1996-97 the ratio of males to females was virtually 50:50. In the national retail industry, male employment grew 15% (higher than in Western Australia) and female employment rose 27% (lower than in Western Australia). The mix of male and female workers in Australian retail trade was similar to that of Western Australia in both 1996-97 and 2006-07.

#### EMPLOYED PERSONS IN RETAIL TRADE, By sex - Western Australia



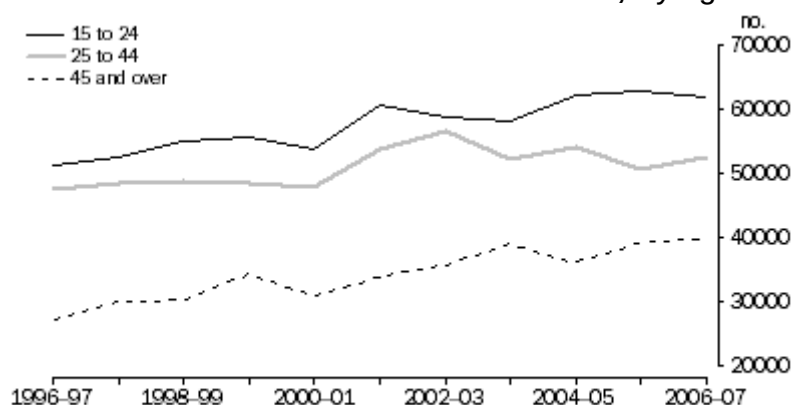
Source: Labour Force, Australia, cat. no. 6202.0.

#### AGE OF WORKERS

In 2006-07, 40% of workers in Western Australia's retail industry were aged 15-24, 34% were aged 25-44 and 26% were aged 45 and over. The proportion of workers aged 15-24 (41% in 1996-97) and 25-44 (38% in 1996-97) decreased, while the proportion of those aged 45 and over (21% in 1996-97) increased. These proportions were very similar to those of the Australian retail industry.

Between 1996-97 and 2006-07, employment growth was strongest in Western Australia's retail industry in the age group 45 and over (up 47% or 12,700), followed by those aged 15-24 (up 21% or 10,800) and 25-44 (up 10% or 4,900). This growth was in line with national increases.

#### NUMBER OF EMPLOYED PERSONS IN RETAIL TRADE, By age - Western Australia

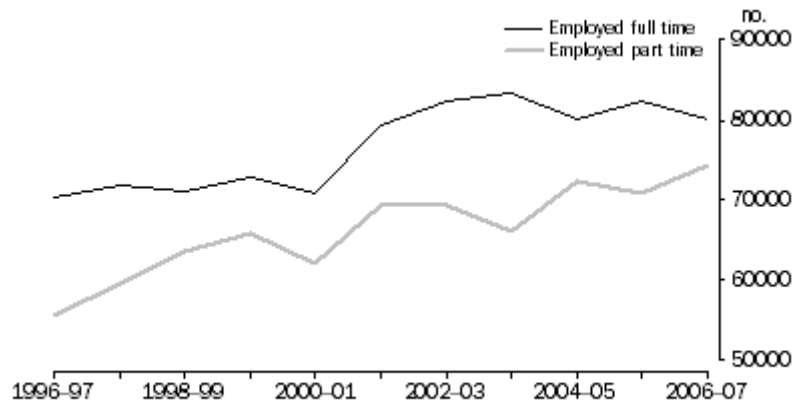


Source: Labour Force, Australia, cat. no. 6202.0.

## HOURS WORKED

In 2006-07, there were almost as many part-time workers (74,400) in Western Australia's retail industry as full-time workers (80,200). Part-time workers (up 34% or 18,800) have increased almost two and half times the rate of full-time workers (up 14% or 9,800) since 1996-97. These increases correlate closely with the Australian retail industry, with part-time employment up 30% and full-time employment up 14%.

### NUMBER OF FULL TIME AND PART TIME WORKERS, Retail trade - Western Australia



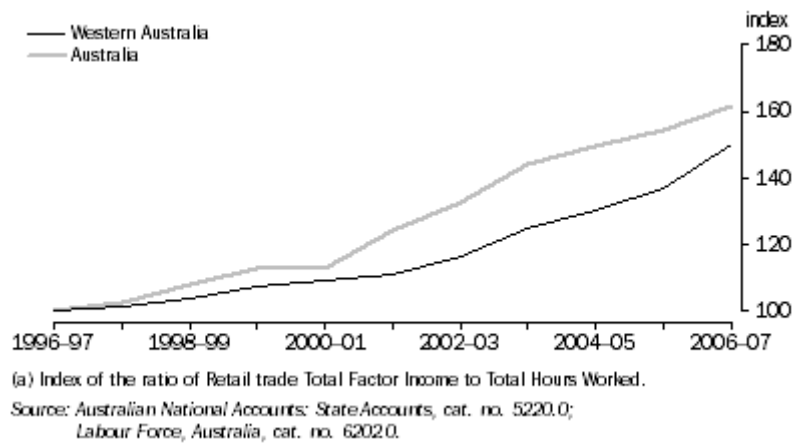
Source: Labour Force, Australia, cat. no. 6202.0.

In Western Australian retail trade, the average weekly hours worked by those employed full-time (43) and part-time (16) were very similar to the national averages of 43 hours per week and 15 hours per week respectively. Average weekly hours worked by retail workers declined for full-time workers from 44 hours in 1996-97 but have increased from 14 hours for part-time workers. These changes reflect of the changes in average weekly hours worked at the national level.

## LABOUR PRODUCTIVITY

Labour productivity is measured by the ratio of output (industry total factor income) to labour input (hours worked). Labour productivity in Western Australia's retail industry rose approximately 50% between 1996-97 and 2006-07. This result was lower than the 62% rise in labour productivity in the Australian retail industry. It is important to note that part of the rise in labour productivity is due to 'capital deepening' (an increase in the ratio of capital to labour).

### LABOUR PRODUCTIVITY(a), Retail trade

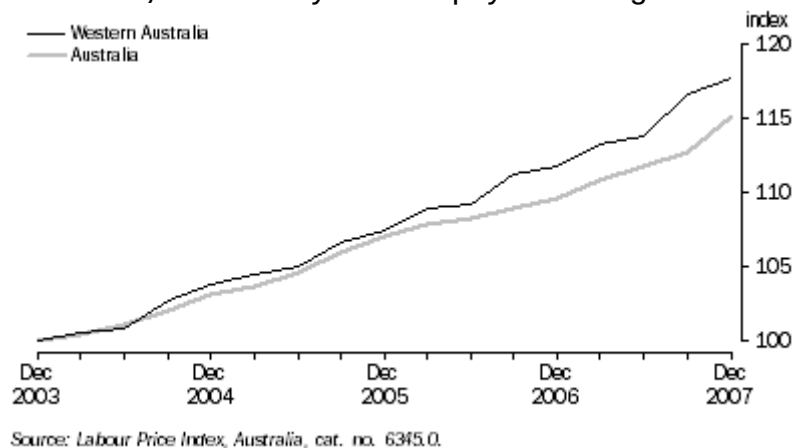


## WAGE PRICE INDEX OF TOTAL HOURLY RATES OF PAY (EXCLUDING BONUSES)

The wage price index measures changes over time in the price of labour in the Australian labour market by following changes to a fixed 'basket' of labour services and is, therefore, unaffected by changes in the quality or quantity of work performed (i.e. pure price changes).

Generally, since 2006, wage price growth in Western Australia's retail trade industry has outpaced growth for the Australian level. From the June quarter 2006 to the December quarter 2007, wage prices in Western Australia's retail trade industry grew by 7.8% (or an average of 1.3% per quarter) compared to 6.4% (or 1.0% per quarter) for the Australian level.

### WAGE PRICE INDEX, Total hourly rates of pay excluding bonuses - Retail trade



## AVERAGE WEEKLY EARNINGS (FULL-TIME ADULT ORDINARY TIME EARNINGS)

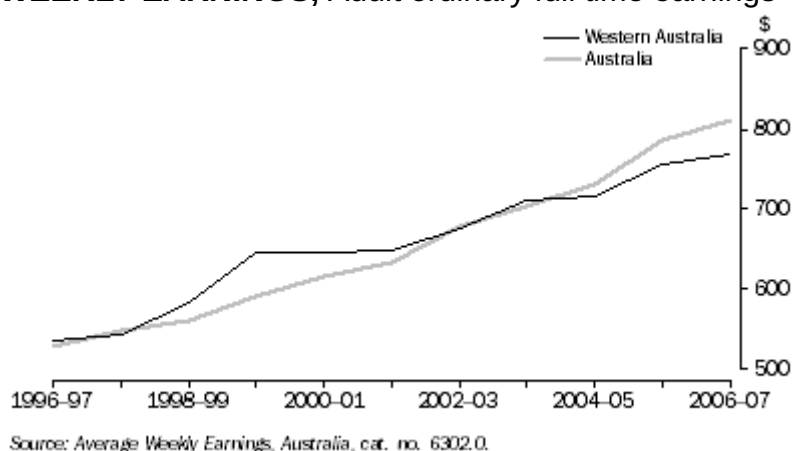
Average weekly earnings measures average gross (before tax) earnings of employees that may be affected not only by changes in the level of earnings of employees but also by changes in the overall composition of wage and salary earners in the labour force.

Between 1996-97 and 2003-04, average weekly earnings, of full-time adult employees in

Western Australia's retail industry, were consistently higher than the national average. In 1996-97, average earnings in Western Australia was \$535 per week compared to \$530 per week across Australia. Western Australia's retail industry earnings rose to \$711 per week in 2003-04, while the national average increased to \$702 per week. However, after 2003-04, Western Australia's average weekly earnings fell below the Australian average for the retail industry. Between 2004-05 and 2006-07, average weekly retail industry earnings rose from \$715 to \$769 in Western Australia, compared to the national average increase from \$732 to \$812.

In overall growth terms, average weekly earnings, of full-time adult employees, in Western Australia's retail industry grew 44% (\$234) between 1996-97 and 2006-07, while nationally they grew 53% (\$282). Over the three years 2004-05 to 2006-07, however, growth in average weekly earnings in Western Australian retail trade grew by only 8% (\$58), half the rate of national earnings in retail trade (up 16% or \$109).

#### **AVERAGE WEEKLY EARNINGS, Adult ordinary full time earnings - Retail trade**



#### **SUMMARY OF WESTERN AUSTRALIA'S RETAIL INDUSTRY**

- Western Australia's strong economic growth over the last 10 years has had a positive impact on retail spending with GSP per capita increasing by 31% from June 1996 to June 2006.
- Increased spending by Western Australian households rose by 52% (\$19 billion), or 4% (\$2 billion) per year between 1996 and 2006 which was largely directed to the retail industry.
- Increased household spending has also coincided with growth in the use of credit and personal loans. Revolving credit quadrupled to \$6.3 billion in Western Australia between 1996-97 and 2006-07. Meanwhile, the value of fixed personal loans for purchasing household goods doubled over the same period (up 97% to \$0.2 billion), and rose 20% to \$1.4 million for motor vehicles.
- Retail turnover in Western Australia rose by 61% to \$24 billion in real terms between 1996-97 and 2006-07, an average of 5% (\$900 million) per year.
- The industry groups of food, household goods and hospitality and services accounted for 74% of retail turnover growth between 1996-97 and 2006-07.
- Western Australia accounted for 10% (\$34 billion) of the retail industry total income 2005-06, which corresponds to Western Australia's population share (10%).
- Between 2002-03 and 2005-06, Western Australia's retail industry had the largest proportionate increases in business income (up 26.1% or \$7 billion) of all states.
- Perth consumers generally paid more for retail commodities than consumers in other

state capital cities. In the June quarter 2007, Perth consumers paid the highest average prices across the states for meat; processed fruit and vegetables; and alcoholic drinks.

- Western Australia recorded the second highest growth rate (behind Queensland) in the number of operating businesses between 2003-04 and 2006-07 (4% or 1,100 businesses). Industries recording the largest increases in business numbers were car retailing (28%), clothing retailing (15%) and takeaway food retailing (12%).
- More than half (52%) of operating businesses in Western Australia's retail industry in 2006-07 were small businesses, which was similar to the proportion operating in New South Wales (53%), Victoria (53%) and Queensland (53%).
- The number of small businesses operating in Western Australia grew by 34.0% between 2003-04 and 2006-07, the second highest after Queensland (34.4%).
- Retail trade employs more people in Western Australia than any other industry. In 2006-07 14% (155,000) workers were employed in retail trade.
- Retail industry employment grew by nearly 23% in Western Australia between 1996-97 and 2006-07, higher than the national rise of 21%.
- Females accounted for 55% of workers employed in Western Australia's retail industry. Female employment grew by 33% between 1996-97 and 2006-07.
- The majority of workers in the retail industry were aged between 15 and 24 years (40%) and a further 34% aged between 25 and 44 years.
- There were almost as many part-time workers in Western Australia's retail industry as full-time workers. The average weekly hours worked by full-time workers was 43 hours and 16 hours for part-time workers.
- From the June quarter 2006 to the December quarter 2007, wage prices in Western Australia's retail trade industry grew by 7.8% (or an average of 1.3% per quarter) compared to 6.4% (or 1.0% per quarter) for the Australian level.
- The average weekly earnings of full-time adult employees in Western Australia's retail industry grew 44% between 1996-97 and 2006-07, while nationally they grew 53%.

# Explanatory Notes

## Abbreviations

### ABBREVIATIONS

The following symbols and abbreviations are used in this publication:

ABARE	Australian Bureau of Agricultural and Resource Economics
ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
ASCO	Australian Standard Classification of Occupations
Aust.	Australia
ERP	estimated resident population
n.e.s.	not elsewhere specified
n.f.d.	not further defined
SITC	Standard International Trade Classification
WA	Western Australia

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